BANKS GROUP

The Right Approach to Satisfied Clients

Gauging client satisfaction levels

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Welcome to the Right Approach to Satisfied Clients – Gauging client satisfaction levels.

This Guide has been designed as a simple tool to assist you in "taking the temperature" of your relationship with your clients. Using the Client Satisfaction Survey, you will gain insight into what your client thinks about your business, their key issues and provide you with a reference source for future clients.

The Guide is also an excellent tool to uncover other issues with the client that you can address.

The Client Satisfaction Survey is ideal an ideal tool to use in attracting prospective clients to your business. It assists you to uncover issues a prospect might be having with an existing service provider – allowing you to tailor and then pitch your proposal accordingly.

This guide contains:

Section 1 – Why understand client satisfaction
Section 2 – Positioning the survey
Section 3 – Getting the most from the survey
Section 4 – Putting it into practice

Section 1 – Why understand client satisfaction

Very often, businesses continue to deliver services to their clients but never stop long enough to ask the client what they think about the service, the people they interact with or whether they have any other issues.

Then businesses are surprised when one day, a client, who they thought was happy, leaves and goes to the competitor down the street. When the business eventually gets to ask their former client why they moved, the inevitable answer is “We weren’t happy with the service.”

Is the business surprised? Of course. The reason is that they never stopped to consider if the client liked the service being provided.

The objectives of conducting a Client Satisfaction Survey are:

- It helps a business understand what the client is thinking
- It helps identify issues before they become major problems
- It is a simple way to get feedback on problem areas (or people) in the business
- It demonstrates the business cares about what its clients think and
- Client satisfaction is strongly linked to client loyalty.

Client satisfaction and client loyalty

Research conducted in 1995 showed some significant insight into what makes a loyal customer:

- There is a strong correlation between customer satisfaction and customer loyalty. The higher the satisfaction level, the greater their loyalty to their service provider
- Most clients defect to other providers because they feel their current provider does not care about them or their problems. This was proved true in over 66% of cases.
- Where a service appears to be tailored for a customer, solve a specific problem or meet a personal need, higher levels of satisfaction are generated
- Completely satisfied customers are SIX times more likely to repurchase than customers who are just satisfied.

So if you want to retain your good clients, you need to work out whether or not they are satisfied with your service. If they are not, you have gained valuable insight to help you resolve the issues before your clients start to leave.

Section 2 – Positioning the survey

The word survey usually promotes visions of endless and mindless questions with seemingly no objective. This Client Satisfaction Survey is very different. It is 10 specific questions designed to gauge a client's thoughts on:

- Service
- People and
- The business

In addition to providing you with an assessment of what the client thinks of your business, it offers an excellent opportunity to explore the impact on services on the client's business or affairs.

Here's how to position the survey with your clients:

1. Conduct the survey face to face with clients. This survey is not designed to be conducted in a mailout. It can be conducted over the phone, but generally the quality of response is not the same.

2. The survey takes no more than 8 – 10 minutes, depending on the client's responses. Very few clients will have a problem with giving 10 minutes of their time to give their opinion.

3. The survey is about helping you improve your services and service delivery to your clients. You are doing this so they benefit.

4. You can conduct the survey at the completion of other business. If you can, make a special appointment with the client to conduct it. This way, you give weight to the importance of the occasion.

Example script to use

Business: "Thank you Mary for taking the time to see me. As you may be aware, [business name] is constantly looking at ways to improve our service and the one of the ways we can do that it to find out what our clients think of us. What I would like to do for the next 8 – 10 minutes, is to ask you 10 questions about our service to you. Would that be okay?

Client: "Yes, I suppose so. Is this some sort of survey?"

Business: "We use that name, but a survey is usually a set of standard questions that do not allow any elaboration by the respondent. Although we use 10 questions, we also ask about impact on you and your business and this is the strength of ours. It allows us a far better understanding than simply asking you for a Good, bad or indifferent response."

Section 3 – Getting the most from the survey

Once over the initial stage of introducing the survey to the client, you can start asking the 10 questions.

Here are a couple of tips to get the most out of the questions:

1. Always ask **OPEN** questions. These questions need more that a “yes” or “no” response. An OPEN question is:
   O– open ended - questions that begin “who”, “what”, “when”, “why”, “how”
   P – probing – needs the client to consider their response
   E – engaging – requires an answer
   N – needs orientated – is looking at the needs of the client

2. Where a response is under a score of around 7, always ask how that service aspect impacts on the client. Clarify responses where necessary to ensure you fully understand the client’s meaning.

3. Use active listening, which means you give positive signals that you are listening. For example:
   - Lean forward
   - Nod
   - Smile
   - Use positive affirmations (yes, uh huh, okay)
   - Ask a question if you don’t understand or clarify meaning –“Do you mean…?”

4. Always ask whether a positive reference will be given. If no, discuss what will be required before the client will give one

5. Always ask for the three vital issues affecting their business or them personally.

6. Thank the client for their time and let them know next steps.

7. Don’t be alarmed by a client giving a poor ranking to a question. In these cases, make sure you understand the exact situation, especially if it hasn’t been resolved. Remember a poor ranking can be even more valuable than a positive response as it gives you a great opportunity to improve.

8. If you think a client is unlikely to be honest with you, consider getting a third party, either from inside or external to you business, to conduct the survey.

How to start

Here is an example from a professional service firm which you can adopt for your own business product:

Business: “Okay. Then let’s begin. The questions use a scale of 1 to 10 with 1 being the lowest and 10 being the highest. The questions cover our service to you, the people who look after you and our business generally.

Client: “That’s clear”

Business: “Great. Question 1. Using the scale 1 to 10, how do you rate the accuracy of the advice we provide to you?”

Client: “It’s usually okay, but occasionally I have to ask for a few things to be corrected. I’d say a 6.”

Business: “On the occasions you have to come back to us, what types of things are involved and what impact does it have on you?”

Client: “Well, it’s generally one or two points in the letter that get cleared up after I’ve spoken to someone. Ahh, the impact… there isn’t really one but it does take me time to do it and once I went over a deadline.”

Business: “Can you tell me a bit more about the things in the letter you have needed to come back to us on?”

Client: “Well, it was mainly advice on the tax for my house that I hadn’t given you all the information for. I didn’t understand it was important, but I spoke to Ben and he cleared it up.”

Business: “Great. Let’s look at Question 2….”

Can you see how the interviewer continued to drill down on the client’s response? So the core issue wasn’t one of poor advice but rather the client not providing all the necessary information. That means the business can now look at what information it asks a client for at the beginning of a job. If the interviewer has simply moved onto question 2 after the client’s initial response, they would not have uncovered this information.

Understanding the questions

A survey template is attached at Appendix One.

Q1. Accuracy of advice

Self explanatory. You are looking for any situations in which the client has needed to have you correct an error.

Q2. Punctuality of advice

Find out if the client is receiving the advice when they expect it. Find out if there is a gap in service expectation.

Q3. Ease of Understanding of advice

Find out whether the advice is easy to understand and simple to implement.

Q4. Quality and usefulness of advice

This question seeks to find out if there are other issues the client has that you can address. Look for opportunities to introduce other services you offer at the end of the survey.

Q5. Regularity of contact/visits

The question is addressing whether the service provider is visible to the key stakeholders. It is looking for the client’s service expectations.

Q6. Professionalism of staff

This question is directed at finding out what your client thinks of your staff and how they expect to be treated in their dealings with your business.

Q7. Responsiveness to issues

This gauges whether you deal with the client’s issues quickly and efficiently.

Q8. Ease of doing business

This assesses whether the client has a positive experience dealing with your practice. Assesses the ease of contacting you and receiving information and provides opportunities to explore alternative ways of doing business.

Q9. Flexibility

How easily can you adapt to periods of peak workloads? Urgent needs of the clients?

Q10. Variety of products and services

This question is looking at identifying whether the client wants a specialist provider or a one stop shop. This is an excellent opportunity to probe for other services the client needs and provides an opening for you to discuss services you offer.

Impact on business

For each response which is below “7”, remember to ask the client what impact or effect it has on their business. This will help you gauge the importance of this area to the client.

Reference

The question seeking a positive reference is an assessment of the overall impression a client has of your business.

Vital issues

Ask the client to identify the major and vital issues facing their business. This will assist you to align your services appropriately to address these needs or to establish a framework which will make it easier for the client to focus on these issues.

Section 4 – Putting it into practice

Contacting clients

Regularly contacting clients is a great way to strengthen your relationship with them, but make sure each contact is meaningful.

You should try to rank your clients which will assist you in formalising a policy on how often such contacts/surveys are completed.

Following up

Conducting the survey alone is not enough. You need to do something with it. The client needs to see that something positive is being done with their feedback so that they will continue to contribute willingly.

Step 1

Record the response to the survey in your client relationship management system or database. Make special note of any comments on impact and the overall score.

Step 2

Identify all responses under a score of “7”. For each of these responses, discuss with the responsible person in your business. For example, if regularity of contact has been rated poorly, discuss a contact plan with the staff member responsible for managing the client relationship.

If a response is the result of a process, discuss the implications and what can be changed with the responsible person.

Step 3

Prepare the letter in Appendix Two using the information gathered in step 2.

Step 4

Schedule a follow up meeting with the client, using the contact schedule above to monitor progress.

Step 5

Schedule follow up dates for the completion of any actions.

Subsequent surveys

Over time, you will build up a picture of the improvement in your relationship with the client. This is valuable information that you can use for a variety of reasons:

- Referrals
- References
- Loyalty programmes
- Special events plus
- Many more.

For a subsequent survey, you can use the tips outlined in the previous sections. Obviously, the introduction will no longer be so lengthy, but remember to refresh the clients memory or explain it fully if someone new is involved.

Following up subsequent surveys is slightly different as you will be comparing results to the previous survey to monitor changes:

Step 1

Record the response to the survey in your client relationship management system or database. Make special note of any comments on impact and the overall score. Retrieve the previous survey conducted. You should take this to your meeting.

Step 2

Identify all responses under a score of “7”. For each of these responses, discuss with the responsible person in your business. For example, if regularity of contact has been rated poorly, discuss a contact plan with the staff member responsible for managing the client relationship.

If a response is the result of a process, discuss the implications and what can be changed with the responsible person.

Where a response has worsened from the previous survey, identify if there have been any special or exceptional circumstances that have given rise to this. It is not sufficient reason if an action has not been completed from the previous survey because of failure to follow up.

Step 3

Prepare the letter in Appendix Three using the information gathered in Step 2. Compare the results of the current survey to that previously completed, and note areas of improvement. Also note any new key issues that client has.

Step 4

Schedule a follow up meeting with the client, using the contact schedule above to monitor progress.

Appendix One

Client Satisfaction Survey

Director ____________________

Date ___ / ___ / ___ Client Name ____________________

Contact ____________________

	Key issue	Rating (1 – 10)	*Impact on client*
Advice	1. Accuracy of the advice we provide to you		
	2. Punctuality of advice		
	3. Ease of understanding of advice		
	4. Quality and usefulness of advice		
People	5. Regularity of contact/visits		
	6. Professionalism of staff		
	7. Responsiveness to issues		
Our business	8. Ease of doing business		
	9. Flexibility		
	10. Variety of products and services		
	Overall rating out of 100		

Based on your overall relationship with us /your current accountant, would you be likely to give us a positive reference? Yes ☐ No ☐

Vital issues

1. ____________________

2. ____________________

3.

Appendix Two

[date]

[client name]
[client address]

Dear [client name]

Satisfaction Survey

Thank you taking the time today to go through our client satisfaction survey questions. As I discussed with you, we are committed to continuously improving the service we offer and use this tool to monitor what our clients think of us.

Your input and feedback is very valuable to us. Overall, you rated our service [percentage from survey]%. You also indicated some specific issues and I have noted these below, together with the actions we propose taking to address these:

[issue]	[action]
[issue]	[action]

I will continue to monitor these actions and will follow up with you regularly to ensure that you are seeing the improvements we are making.

Of course, if you have feedback at any other time, we welcome your comments. Please let me or [other contact] know if you have anything you would like to discuss with us.

Yours sincerely

[contact name]

Appendix Three

[date]

[client name]
[client address]

Dear [client name]

Satisfaction Survey

Thank you taking the time today to go through our client satisfaction survey questions. As I discussed with you, this is a regular feature of our continuous improvement programme and we are committed to delivering quality services that meet the needs of our clients.

Your input and feedback is very valuable to us. Overall, you rated our service [percentage from survey]%. This is a change from the survey we conducted on [date of previous survey].

[Include commentary on changes, paying particular attention to major improvements or any downward changes]. Here is a comparison of the survey results:

	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10
Last survey										
This survey										

You also indicated some specific issues and I have noted these below, together with the actions we propose taking to address these:

[issue] [action]
[issue] [action]

I will continue to monitor these actions and will follow up with you regularly to ensure that you are seeing the improvements we are making.

Of course, if you have feedback at any other time, we welcome your comments. Please let me or [other contact] know if you have anything you would like to discuss with us.

Yours sincerely

[contact name]

Appendix 3 – Full script for the company

Business: "Thank you Mary for taking the time to see me. As you may be aware, [business name] is constantly looking at ways to improve our service and the one of the ways we can do that it to find out what our clients think of us. What I would like to do for the next 8 – 10 minutes is to ask you 10 questions about our service to you. Would that be okay?

Client: "Yes, I suppose so. Is this some sort of survey?"

Business: "We call it a survey which is probably a bit misleading. A survey usually does not allow any elaboration by the respondent and rarely do you receive any feedback. Although we use a standard 10 questions, we also ask about impact on you and your business and this is the strength of ours. It allows us a far better understanding than simply asking you for a for Good, bad or indifferent response."

Client: "Okay then. Only 10 minutes?"

Business: "Yes that right. That's plenty to take a snapshot of how you view our relationship. Let's begin. The questions use a scale of 1 to 10 with 1 being the lowest and 10 being the highest. The questions cover our service to you, the people who look after you and our business generally.

Client: "That's clear"

Business: "Great. Question 1. Using the scale 1 to 10, how do you rate the accuracy of the advice we provide to you?"

Client: "It's usually okay, but occasionally I have to ask for a few things to be corrected. I'd say a 6."

Business: "On the occasions you have to come back to us, what types of things are involved and what impact does it have on you?"

Client: "Well, it's generally one or two points in the letter that get cleared up after I've spoken to someone. Ahh, the impact… there isn't really one but it does take me time to do it and once I went over a deadline."

Business: "Can you tell me a bit more about the things in the letter you have needed to come back to us on?"

Client: "Well, it was mainly advice on the tax for my house that I hadn't given you all the information for. I didn't understand it was important, but I spoke to Ben and he cleared it up."

Business: "Great. Let's look at Question 2. Using the same scale, how would you rate the punctuality of the advice we provide."

Client: "What does that mean?"

Ensure the client understands the question. Use the explanations in Section 3

Business: "Well, we're trying to find out whether you are receiving advice when you expect it."

Client: "Oh right. Yes that good. Maybe a 7 to 8."

Note comments like this as they indicate that your services may not be well publicised.

Business: “What other things you would like advice on?”

Client: “None really. Although I would like more information on the investments, but you don’t do that.”

Business: “We do have a qualified financial planner working with us and we send out our quarterly magazine. Would you prefer to talk to someone or read about investments and what sort of investment?”

Client: “Mainly property related ones. I’d like to see more articles in your magazine, but I might come and talk to your planner.”

Always look for the opportunity to cross sell your services

Business: “ How about I organise an appointment for you?”

Client: “That would be great.”

Business: “I’ll just make a note of that. Now question 3. How easy is our advice to understand?”

Client: “The tax system is so complicated but your tax person always makes it simple. Definitely a 9.”

Business: “Do you mainly deal with Bob?”

Positive reinforcement

Client: “Yes that’s right.”

Business: “He’ll be pleased with that feedback. Other than the tax for your house, what other tax help we can provide you with?”

Warning: Responses like this suggest there is something that the client either doesn’t know about you or doesn’t like. Always explore these fully.

Client: “None at the moment I think. But you’re always my first choice.”

Business: “That’s good. Do you use someone else?”

Client: “Not often. I sometimes get Diane Highfees to give me some capital gains stuff.”

Business: “Well, Bob provides advice on capital gains as well. How do you find Diane?”

Opportunity to find out more about your competitor

Client: “Not as good as Bob, that’s for sure. Her fees are too high.”

Business: Making a note of that “I’ll get Bob to give you a call to a have a chat about whether he can help you. Time’s running away with me so I’ll move on to question 4 which you’ve sort of answered already. How would you rate the quality and usefulness of the advice we provide?”

Client: “That’s excellent. Definitely a 9.”

Business. “Yes, our quality is certainly something we pride ourselves on. The next couple of questions relate to the people in our business you deal with. You’ve already mentioned Bob but these questions are a little more general. How regularly do we contact you?”

Client: “Well so far it’s only been at tax time so I’d say a 5.”

Business: “That’s certainly an area we can improve on. How often would you like to see us or hear from us?”

Client: “Given the amount of change in my affairs and business, I’d like to hear from you at least every two months. I don’t need a visit, haven’t got time for that, but a call would be good.”

Business: “Okay, I can arrange that and we can look at it from time to time. I’ll give you a call tomorrow to set up some dates. Right, Question 6, How professional do you think our staff are?”

Client: “ Are we still using the same ranking?” (Business nods) “Then a 8.”

Business: “How responsive are we to issues? In other words, do we deal with your issues quickly and efficiently?”

Client: “Well, yes, generally you are responsive.”

Business: “So what rating would be reflect that?”

Always look for a rating to be given. Don’t suggest one, rather have the client make the decision.

Client: “I don’t know, maybe a 6.”

Business: “What areas do you think we could improve on?

Client: “Well, I’d like to know what you need from me beforehand and there have been a couple of times when I’ve been promised my work back but it’s a couple of days late. I’m usually working to some deadline as well so it can mean that I’m late.”

Business: “What do you think about say, us getting a checklist to you before we start you job and you can let us know at the same time what you deadline dates are?

Client: “That’s reasonable. If I know what I have to give you, it makes my life easier.”

And so the interview continues. After finishing, Business quickly calculates the score and tells Client. Business then wraps up the appointment.

Business: “Mary, thanks so much for your time today. I know we took a little longer than the 10 minutes, but you’ve given me some very valuable feedback which I can take back and start working on. Just to finish up I have two quick questions.”

Client: “Good to know you’re looking at improving, what’s the first question?”

Business: ”Based on your overall relationship with [business name], would you be likely to give us a positive reference?

Client: “Yes, not a bother.”

A hesitation usually means that the client has reservations. If they are still wavering, ask what improvements the business would need to make for them to give a positive reference.

Business: “Excellent. Obviously we would call you beforehand if we would like you to talk to a new or potential client. Right final question, just so we can build a better picture of your business, can you tell the 3, vital issues you have at the moment?”

On completion, tell the client the next steps outlined in Section 4 and thank the client for their time. This interview would have taken longer than 10 minutes but because the client was being asked their opinion, this is unlikely to have been an issue.