Client Feedback Program

Build your firm through an annual, measurable and easy-to-execute Client Feedback Program

360^0 Client Feedback

Listen hard and your clients will reveal the secrets to growing your business!

Independently Conducted By:

CLIENT ◆ OPINIONS

MARKET-DRIVEN THINKING

For more information on this program, please contact us at info@clientopinions.com or feel free to call us at 610.933.2542

About the Client Feedback Program

Objectives

- **To help your firm retain and develop its most valuable clients**
- **To help your firm secure new business**
- **To help your firm be viewed as a valued partner**

The Idea – Build Your Business

To help firms build their business through an annual, automated and measurable client feedback program that is independent, confidential and very easy to execute.

How it Works – Just Send an Email; We Do the Rest!

Client Opinions has developed a completely turn-key survey program. We handle all the details of designing, executing, and reporting. We even provide you with the email invitation you send to your clients. All you need to do is send the email.

Steps	Your Firm	Client Opinions
1) Send email to clients	●	
2) Develop and write client survey		●
3) Ensure sound research methodology		●
4) Create the client email invitation		●
5) Execute survey & collect responses		●
6) Analyze results		●
7) Issue Final Report		●

Key Benefits – 17 Invaluable Learnings from Clients

1. **Revenue Growth Opportunities**. How many clients feel there is an opportunity for you to deepen your relationship with them? Who are they?
2. **Brand Image**. What thought comes to mind when a client thinks of your firm?
3. **Product/Service Satisfaction**. Are clients satisfied with your firm's products/services?
4. **Responsiveness.** Do clients feel you are attentive to their issues and concerns?
5. **Customer Service**. How do clients feel about the quality of customer service & support?
6. **Reputation**. How strong is your firm's reputation among clients?
7. **Knowledge & Expertise**. Do clients feel your firm has a high level of knowledge & expertise?
8. **Value Added**. How do clients feel about your firm's ability to deliver value?
9. **Suggested Improvements**. What do clients feel your firm should start and stop doing?
10. **Client Enthusiasm.** What would make clients enthusiastic about your firm?
11. **Willingness to Refer the Firm.** Which clients would recommend your firm?
12. **Critical Issues.** Are there any issues that your clients feel need immediate attention?
13. **Website.** How do clients feel about the quality and content of your firm's website?
14. **Business Challenges.** What business challenges will clients be facing in the next year?
15. **Support of Long Term Needs.** How confident are clients in your firm's ability to support their long term needs?
16. **Overall Satisfaction**. Are clients satisfied with their overall relationship with your firm?
17. **Individual Client Response Profile.** How did each client answer each question?

Reporting and Analytics - Examples

Aggregate Reporting shows average aggregate responses for all questions. This enables you to see how your firm is performing and how well you are meeting or exceeding the needs of your clients. Importantly, you can track your key performance indicators over time and compare them to internal benchmarks. This allows you to measure the impact of changes you have made in your business.

Would you recommend this firm's products/services to a close friend or colleague?

(Respondents could only choose a **single** response)

Response	Chart	Frequency	Count
Yes, definitely		**69.0%**	**154**
Likely		22.0%	49
Maybe		4.5%	10
Unlikely		4.5%	10
No, definitely not		0.0%	0

In terms of improving to better serve your needs, what should this firm *start* doing?
(Please explain.)

Response
I would like to see you provide more online seminars to demonstrate the full capability of your product. I am not as technologically advanced as some of the younger people in my office and I often need to be shown how things work.
You could be more proactive in bringing product upgrades to the marketplace without waiting for clients to demand them. Clients are not necessarily on the cutting edge, and may not know what to ask for.
You need to determine who the lead contact is for me. Every time I call I get a different person.
If you sent bills out immediately after my order it would be helpful for me come tax time.
l like a small fish in a big pond. I nty of other smaller firms who ys like me.
a black whole and I never hear

Please rate your satisfaction with this firm in the following areas?

		Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Total
Reputation within your company	Count	0	0	4	16	**188**	208
	% by Row	0.0%	0.0%	1.9%	7.7%	**90.4%**	100.0%
Knowledge & Expertise	Count	0	0	48	72	**88**	208
	% by Row	0.0%	0.0%	23.1%	34.6%	**42.3%**	100.0%
Delivering value	Count	0	8	20	**120**	60	208
	% by Row	0.0%	3.8%	9.6%	**57.7%**	[illegible]	100.0%
Commitment to quality	Count	0	0	20	72	**116**	208
	% by Row	0.0%	0.0%	9.6%	34.7%	**55.8%**	100.0%
Total	Count	**0**	**8**	**92**	**280**	**452**	**832**
	% by Row	**0.0%**	**0.9%**	**11.1%**	**33.7%**	**54.3%**	**100.0%**

Individual Response Reporting shows how each client answered every question allowing you to take action on a client-by-client basis.

Frank Smith

#	Question	Response
Q1	**What immediate thought comes to mind when you think of this firm?**	A valued partner of my business
Q2	**How do you feel about this firm in the following areas:**	
	Reputation	Very Satisfied
	Knowledge and expertise	Very Satisfied
	Delivering value	Satisfied
Q3	**Please rate your satisfaction with this firm's customer service in the following areas:**	
	Understanding your needs	Sat
	Responsiveness to your needs	Ve
	Professionalism	Dis
Q4	**To better serve your needs, what should this firm start doing?**	Yo
Q5	**How confident are you in this firm's ability to support your long-term needs?**	Co
Q6	**What...**	

Jane Doe

#	Question	Response
Q1	**What immediate thought comes to mind when you think of this firm?**	Excellence and professionalism
Q2	**How do you feel about this firm in the following areas:**	
	Reputation	Neutral
	Knowledge and expertise	Very Satisfied
	Delivering value	Satisfied
Q3	**Please rate your satisfaction with this firm's customer service in the following areas:**	
	Understanding your needs	Satisfied
	Responsiveness to your needs	Very Satisfied
	Professionalism	Very Satisfied
Q4	**To better serve your needs, what should this firm start doing?**	Call on me more frequently, sometimes I feel out of touch.
Q5	**How confident are you in this firm's ability to support your long-term needs?**	Very confident
Q6	**What...**	

About Client Opinions, Inc.

Client Opinions is dedicated to providing firms with an automated, measurable, continuous and easy to execute method of obtaining client feedback -- ensuring client research is a proactive and on-going part of the way firms conduct business. This allows our customers to anticipate problems, capitalize on opportunities and deepen client relationships.

You can't avoid getting client feedback. Your choice is to get it proactively or reactively!
A strong client feedback program enables you to be proactive – to anticipate problems, take corrective action and identify new sales leads and revenue opportunities.

Research & Industry Experience

Client Opinions has developed a rich base of research capabilities across many industries including:

Banking • J.P. Morgan Chase • Bank of Hawaii • Citizens Bank • State Bank of Cross Plains • First National Bank in Sioux Falls	**Health Care & Pharmaceutical** • Health Care Benchmarking Study • Air Methods Corporation • Wedgewood Pharmaceutical • Impact Rx • Medical Justice Services
Insurance & Investments • USI Affinity • The Resource Group (TRG) • Premier Partners (part of Lincoln Financial Advisors) • LPL Financial	**Consulting, Training & Services** • Clarkston Consulting • Sagemark Consulting • Antiphony Consulting • Training Industry Branding Study
Mutual Funds & Service Providers • Lockwood Financial Group • Royce Funds • Unified Fund Services • The Vanguard Group	**Institutional Asset Management** • Brandywine Global Investment Management • Batterymarch Financial Management • Gen Re Capital • Pitcairn Financial Group
Associations and Societies • Eastern Technology Council • Canadian Plastics Association • TIE Global Entrepreneur Association • CFA® Society of Philadelphia	**Consumer & Retail** • Procter & Gamble • IBM Consumer Products • Nesting Feathers Retail Store • Qurio Digital Photography
Hedge Funds, Private Equity, Venture Capital • Hamilton Lane • Safeguard Scientifics • CMG Investment Advisors	**Education & Non-Profit** • The University of North Carolina – Chapel Hill • The American College • The Miquon School
Manufacturing • St. Johns Packaging • Layfield Poly Films • Glopak, Inc.	**Technology** • Flashpoint Technology • UNX Technology • Technology Initiatives & Outsourcing Studies

Contact Us

If you are interested in learning more about this program, please contact us at info@clientopinions.com or feel free to call us at 610.933.2542.

CLIENT ◆ OPINIONS
MARKET-DRIVEN THINKING

www.clientopinions.com

1709 Legion Road, Suite 217
Chapel Hill, NC. 27517
Phone: 919.932.4350
Fax: 919.932.4654