

Customer Feedback Program for Consulting Firms

Build your business through an annual, measurable and
easy-to-execute Customer Feedback Program

360⁰ Customer Feedback



*Listen hard and your customers 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 Customer 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 consulting firms build their business through an annual, automated and measurable customer 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 customers. All you need to do is send the email.

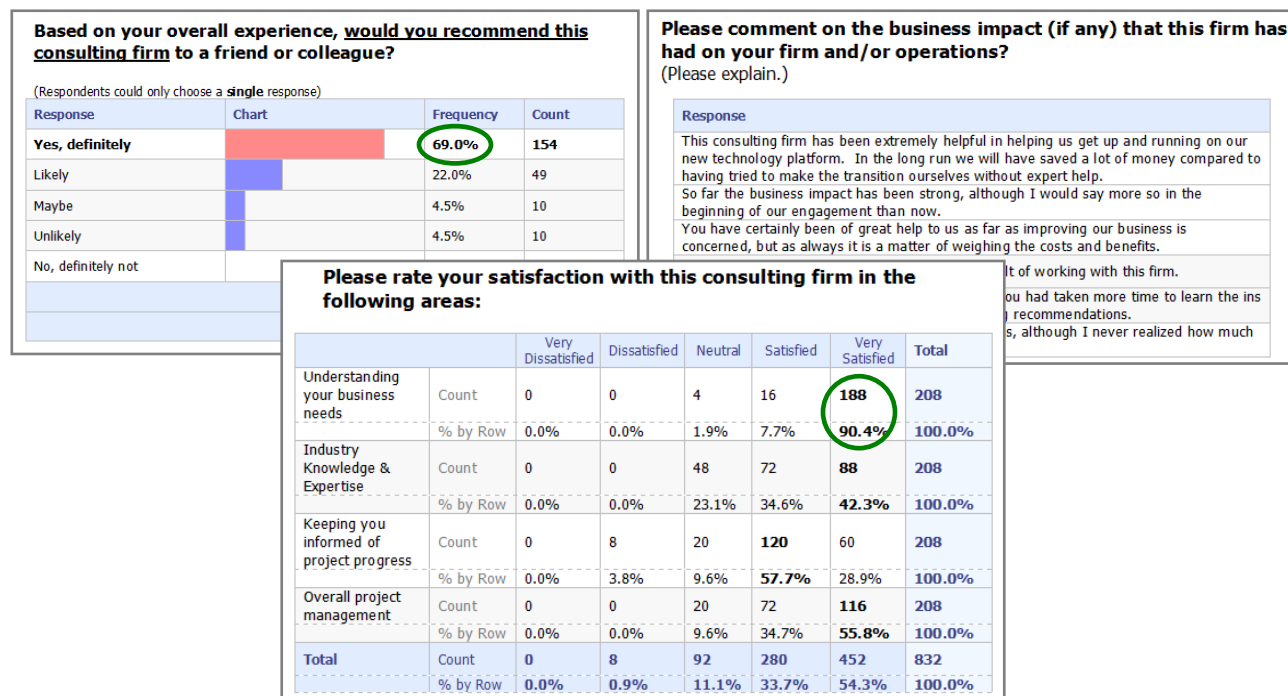
Steps	Your Firm	Client Opinions
1) Send email to customers	●	
2) Develop and write customer survey		●
3) Ensure sound research methodology		●
4) Create the customer email invitation		●
5) Execute survey & collect responses		●
6) Analyze results		●
7) Issue Final Report		●

Key Benefits – 17 Invaluable Learnings from Customers

1. **Revenue Growth Opportunities.** How many customers 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 customer thinks of your firm?
3. **Responsiveness.** Do customers feel you are attentive to their issues and concerns?
4. **Project Management.** How do your customers feel about overall project management?
5. **Teamwork.** How do customers feel about your firm's engagement with their organization?
6. **Knowledge & Expertise.** Do customers feel your firm has a high level of knowledge & expertise of their business and industry?
7. **Business Impact.** How do customers feel the business impact your firm has had?
8. **Value.** Do customers feel your firm offers good value compared to other consulting firms?
9. **Communication.** Do customers feel that you proactively communication with them?
10. **Delivery.** How do customers feel about your firm's ability to deliver on time/budget?
11. **Suggested Improvements.** What do customers feel your firm should start and stop doing?
12. **Effectiveness.** Are customers satisfied with your firm's effectiveness?
13. **Willingness to Refer the Firm.** Which customers would recommend your firm?
14. **Trend Perceptions.** How do customers feel about your firm now vs. a year ago?
15. **Business Challenges.** What business challenges will customers be facing in the next year?
16. **Support of Long Term Needs.** How confident are customers in your firm's ability to support their long term needs?
17. **Individual Client Response Profile.** How did each customer 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 customers. 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.



Please rate your satisfaction with this consulting firm in the following areas:

		Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Total
Understanding your business needs	Count	0	0	4	16	188	208
	% by Row	0.0%	0.0%	1.9%	7.7%	90.4%	100.0%
Industry Knowledge & Expertise	Count	0	0	48	72	88	208
	% by Row	0.0%	0.0%	23.1%	34.6%	42.3%	100.0%
Keeping you informed of project progress	Count	0	8	20	120	60	208
	% by Row	0.0%	3.8%	9.6%	57.7%	28.9%	100.0%
Overall project management	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 customer answered every question allowing you to take action on a customer-by-customer basis.

Frank Smith		
#	Question	Response
Q1	When you think of this consulting firm, what immediate thought comes to mind?	Industry Experts
Q2	Please rate your satisfaction with this consulting firm in the following areas:	
	Professionalism	Neutral
	Responsiveness	Very Satisfied
	Knowledge & Expertise	Very Satisfied
Q3	Please rate your satisfaction with delivery in the following areas:	
	Delivers on time	Satisfied
	Delivers on budget	Satisfied
	Delivers good value	Very Satisfied
Q4	What are the two biggest challenges facing your business in the next 12-24 months?	1) Scaling capital
Q5	Would you recommend this consulting firm to a close friend or colleague?	Likely
Q6	What...	

Jane Doe		
#	Question	Response
Q1	When you think of this consulting firm, what immediate thought comes to mind?	Excellence and professionalism
Q2	Please rate your satisfaction with this consulting firm in the following areas:	
	Professionalism	Neutral
	Responsiveness	Very Satisfied
	Knowledge & Expertise	Satisfied
Q3	Please rate your satisfaction with delivery in the following areas:	
	Delivers on time	Satisfied
	Delivers on budget	Very Satisfied
	Delivers good value	Very Satisfied
Q4	What are the two biggest challenges facing your business in the next 12-24 months?	New website launch and managing company growth
Q5	Would you recommend this consulting firm to a close friend or colleague?	Yes, definitely
Q6	What...	

About Client Opinions, Inc.

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

You can't avoid getting customer feedback. Your choice is to get it proactively or reactively!

A strong customer 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:

<u>Banking</u> <ul style="list-style-type: none">● J.P. Morgan Chase● Bank of Hawaii● Citizens Bank● State Bank of Cross Plains● First National Bank in Sioux Falls	<u>Health Care & Pharmaceutical</u> <ul style="list-style-type: none">● Health Care Benchmarking Study● Air Methods Corporation● Wedgewood Pharmaceutical● Impact Rx● Medical Justice Services
<u>Insurance & Investments</u> <ul style="list-style-type: none">● USI Affinity● The Resource Group (TRG)● Premier Partners (part of Lincoln Financial Advisors)● LPL Financial	<u>Consulting, Training & Services</u> <ul style="list-style-type: none">● Clarkston Consulting● Sagemark Consulting● Antiphony Consulting● Training Industry Branding Study
<u>Mutual Funds & Service Providers</u> <ul style="list-style-type: none">● Lockwood Financial Group● Royce Funds● Unified Fund Services● The Vanguard Group	<u>Institutional Asset Management</u> <ul style="list-style-type: none">● Brandywine Global Investment Management● Batterymarch Financial Management● Gen Re Capital● Pitcairn Financial Group
<u>Associations and Societies</u> <ul style="list-style-type: none">● Eastern Technology Council● Canadian Plastics Association● TIE Global Entrepreneur Association● CFA® Society of Philadelphia	<u>Consumer & Retail</u> <ul style="list-style-type: none">● Procter & Gamble● IBM Consumer Products● Nesting Feathers Retail Store● Curio Digital Photography
<u>Hedge Funds, Private Equity, Venture Capital</u> <ul style="list-style-type: none">● Hamilton Lane● Safeguard Scientifics● CMG Investment Advisors	<u>Education & Non-Profit</u> <ul style="list-style-type: none">● The University of North Carolina – Chapel Hill● The American College● The Miquon School
<u>Manufacturing</u> <ul style="list-style-type: none">● St. Johns Packaging● Layfield Poly Films● Glopak, Inc.	<u>Technology</u> <ul style="list-style-type: none">● Flashpoint Technology● UNIX Technology● Technology Initiatives & Outsourcing Studies

Contact Us

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