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How to Measure Client Satisfaction

Online Exclusive Column: MarketingWorks

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Your clients seem happy, but how much do you really know about their satisfaction with your firm and services? Have you asked them?

Chances are you haven't asked ... at least not in an effective manner. Many accounting professionals might think measuring client satisfaction is a lot of effort with little return. In reality, determining your value can easily open doors to increasing client retention and even recruiting new clients.

This topic was recently presented by John Remsen Jr. of The Remsen Group (www.theremsengroup.com) at a local meeting of the Legal Marketing Association. In the realm of "professional services marketing," there are many parallels between lawyers and accountants. However, I will go on record to say that accountants are light years ahead of lawyers with regard to marketing themselves and accepting the inherent risk.

Remsen's talk got me thinking. How can tax and accounting professionals measure their work in a more meaningful way?

Put Yourself in Front of the Client

Hopefully, by now, you know that any performance review — even your own — shouldn't be a surprise to the recipient. Ongoing, consistent communications should occur year-round, not just during a certain time of the year.

While the accounting environment is traditionally structured around communications just a few times annually (busy season, for example), it's time to break the rules and find ways to get in front of your clients some time other than during a tax or filing deadline. Remember that measuring client satisfaction can be done in ways other than a formal survey (although we'll get to that below), and it doesn't have to be costly.

There are two ways to get in front of the client — in person or over the phone — and for goodness sakes, don't e-mail the client to find out how you're doing! A face-to-face meeting works fine, but also requires a bit of time to set up in addition to time out of the office.

A much better approach (and one that seems more spontaneous) is to call the client and have a conversation. It's a sure bet the client will really appreciate your call. This tactic sounds elementary, and it is. But when was the last time you did it?

Make it clear the clock is not running, but definitely have a purpose or agenda you can stick to during the conversation ... and be strategic rather than tactical. For example, instead of asking, “How are we doing?” state something more tangible, such as, “We want to minimize your tax liability. Let’s explore ways to make this happen.” Or try something like, “We haven’t had an in-depth conversation about your company in a long time. Let’s talk about ways we can interface with you to help you grow.”

No matter how the conversation goes, you’ll still get feedback on how you’re doing. If the feedback is positive, great! If not, don’t get defensive; find a way to turn a negative into a positive.

Send a Post-Engagement Questionnaire

If you’re dead-set on determining your value through a survey, this may be the most painful way to measure satisfaction.

First, it’s a time burden. A survey requires you or your staff to actually write the questions, send it to the client, wait for it to come back, and, most likely, call or send e-mail reminders asking the client to complete it.

Second, you have to do something with the results once you get them. If you ask for feedback, you must respond to the client’s answers, good or bad. If you don’t respond in some manner, the client will conclude that you were only going through the motions to seem that you cared.

Third, your clients’ survey results will never be the same, so you can’t really standardize your follow-up conversation or actions. Each one takes analysis and thought. Will you have the time it takes to do this?

If so, then here are some pointers:

- Keep it short — no more than one page.
- Make it clear — no clever wording or jargon. Get to the point up front.
- Use a 10-point scale (1 = poor, 10 = excellent), asking the client to rate satisfaction in no more than 10 areas.
- Make it available online, if possible. SurveyMonkey (www.surveymonkey.com), for example, offers a simple, online survey tool. It’s free for basic service.
- Include a return deadline. Put this deadline in the subject line of an e-mail.

While it’s good to measure the technical know-how of your firm, your accounting expertise should already be satisfactory to the client; otherwise, you would already

know there was a problem. Instead, focus on the areas upon which you can improve:

- Effective Planning & Implementation
- Communications
- Flexibility
- Billing Procedures and Accuracy
- Service
- Thought Leaders
- Insightful
- Helps me Build Business
- Provides Solutions
- Sensitive to Our Needs

You'll also want to ask for some written comments, but do so, again, in a constructive format that will help you better serve the client in the future:

- How can we serve you more effectively?
- What's changed in your business over the last 12 months? The answer will help you provide solutions to address these opportunities.
- What kinds of referrals are you looking for? You can serve as a link to even more solutions — strengthening your value as a solutions provider.

Try a Mix of Tools

It should be obvious by now that no two conversations or surveys will be alike, so think in terms of a mix of tools or tactics instead of just one method. While we can't go into all of these methods in this column, e-mail me your thoughts (scott@cytronandcompany.com) as to how you measure client satisfaction, and I'll include your responses in upcoming columns or on CPATechViews.com.

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