

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

client's experience. A client satisfaction survey can help you do that.

**Becky Livingston** • Mar. 18, 2024



With tax season nearly over, it's a great opportunity to understand more about your

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## Know Your Objective

Clearly define what you aim to achieve with the survey. Is it to gauge customer satisfaction, get service feedback, or understand the client's future needs? A focused objective ensures that the survey remains concise and relevant.

## Personalization is Key

Address the respondent by name and tailor questions based on their interactions with your company. This approach demonstrates that you value their specific input, leading to higher response rates and more accurate data. To accomplish this, you may need to program logic into the survey, leverage a CRM tool, or have a paid email service provider subscription with common email platforms like MailChimp and Constant Contact.

## Keep it Concise

Time is a precious commodity. Ensure your survey is brief yet comprehensive, typically no more than 10-15 questions.

## Design for Clarity

The survey should be visually intuitive, with a clean layout and easy-to-understand questions. This user-friendly approach encourages completion and reduces abandonment rates. [Microsoft](#) has dozens of customizable templates to choose from.

## Offer Incentives

To enhance response rates and foster goodwill, acknowledge the time and effort clients put into completing your survey with a thank you note or a small reward. An

example incentive is a donation to a nonprofit for every survey completed.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Typeform elevates the survey experience.

3. **Google Forms:** A cost-effective and straightforward option, ideal for companies just starting with surveys.
4. **Qualtrics:** Offers advanced analytical tools and customization options, perfect for in-depth surveys.
5. **Zoho Survey:** Integrates well with other Zoho apps, providing a seamless experience for those already within the ecosystem.

## What questions should you ask?

Below is a list of questions you could include in your survey. Of course, customize them based on your firm's services and client industries. See a [live example using Google Forms](#) using the following questions.

1. How would you rate your overall satisfaction with our products/services? [*use a scale of 1-5 or 1-10*]
2. What do you value the most about our partnership? [*use a multiple choice predetermined list based on firm objectives*]
3. Are there any recent experiences with our company that you'd like to share, positive or negative? [*make this a text box*]
4. How well do our products/services meet your needs? [*use a scale of 1-5 or 1-10*]
5. What can we do to improve your experience with us? [*use a multiple choice predetermined list based on firm objectives*]
6. How likely are you to recommend our products/services to a colleague or business associate? [*use a scale of 1-5 or 1-10*]
7. Are there any features or services you wish we offered? [*use a multiple choice predetermined list based on firm objectives*]
8. How do you find our customer support and service responsiveness? [*use a scale of 1-5 or 1-10*]

9. What prompted you to choose us over our competitors? *[use a multiple choice*

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

At [Your Company Name], we continually strive to enhance our products/services and ensure they align with your firm's goals and expectations. That's where you come in.

We invite you to participate in a brief survey to gather your insights and experiences with our firm. Your responses will directly influence how we evolve to better serve your needs.

The survey should take no more than [X minutes] to complete, and as a token of our appreciation, [mention any incentive if applicable].

[Insert Survey Link]

Your input is crucial, and we genuinely look forward to your valuable perspectives. Thank you in advance for your time and contributions to our shared growth.

Warm regards,

[Your Name]

[Your Position]

[Your Company Name]

—

## Foster Stronger Relationships

By utilizing a client satisfaction survey at least once a year, using the right tools, asking pertinent questions, and communicating thoughtfully with your clients, you can foster stronger relationships, enhance your offerings, and drive your firm's business forward.

What are some tips you would share with other CPAs about sending client surveys?

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

© 2024 Firmworks, LLC. All rights reserved