

Business Aptitude

Practice Development Services



External Client Survey

What are your clients' perceptions of your accounting firm? Client perception is everything! What are your clients' perceptions of your firm? What can you do to improve the level of client communication and interaction you're your firm?

The Business Aptitude Practice Survey is a proven tool for obtaining independent feedback from your clients on the state of your firm.

Our results speak for themselves:

- Average 35% response rate to detailed survey (range 30-45%).
- Clear quantitative analysis of practice strengths and weaknesses from the clients' perspective
- Direct feedback from clients will help identify specific issues immediately.
- Opportunities for additional services will be identified directly by your clients.

The Survey asks clients for feedback on 3 key aspects of their interaction with your firm:

1. The firm

As is human nature, people make judgements about things. As your clients do business with the practice they are probably making judgements. When they judge the firm, they make comparisons by comparing the quality of service the firm provides with their previous experience and expectations. These previous experiences may be of the firm, another accountant, or even another professional services organisation. Whether or not we think this is fair, your clients' opinions about the firm will influence client retention rates, yield per client and the volume of client referrals

Contact us about the training we provide to help firms service their clients more effectively

Ph 1300 883 789

Take Control of Your Time – Create more time to grow your firm

Visit www.bizaptitude.com.au for our comprehensive time management program designed specifically for accounting firm. Train your team in your own office, at a time that suits you.

Practice Management Tips from Business Aptitude

Business Aptitude, one of Australia's leading Practice Management consulting groups, provides hands-on support to accounting firms in the areas of strategic planning, systems, team development, client management and external communications.

Call 1300 883 789 or email enquiry@bizaptitude.com.au for feedback and advice on practice management issues and enquiries.

You can also subscribe to our regular news bulletin at www.bizaptitude.com.au.

2. The people in the firm

Two aspects to consider in the interaction between your people and your clients is quantity and quality; that is, how often do clients want to be communicated with, and does the quality of the communication disappoint, satisfy or delight them. These factors contribute significantly to the relationship between the practice and your clients, and therefore are important considerations in protecting and growing your client-base.

3. Service and Support

'Service' is the way your firm goes about delivering what it does. The quality of service a client receives depends upon how well the firm meets the needs of the client during delivery. In determining quality of service, clients will often consider consistency; that is, what they can expect given previous experience. The level of service the firm provides is most often determined by the systems it employs, and there is a direct relationship between the employment of effective systems and the consistency of quality service.

Other areas of focus

The survey also incorporates questions covers the following key areas,

- Any transition which the Practice is undertaking
- Client preferences in relation to billing procedures
- General comments relating to professionalism, proactively, level of interest in client needs and level of support required.
- Understanding of services offerings, including integration of services

We will also incorporate additional questions to address specific needs of your firm if required. The survey is usually sent to between 100 and 200 clients, depending on the size of the firm.

Many accounting firms have used Business Aptitude's Client Survey to better understand client 'hot spots' and how they can align their services to better meet client needs and expectations.

For further information, contact Business Aptitude on Ph 02 9904 8400 ... or send us an email at support@bizaptitude.com.au

Some typical client requests from surveys

Up to date superannuation advice.

Less reactive, more proactive.

Provide a wider range of services eg investment advice, tax, super and retirement planning advice in a more active manner.

Explain costs better.

Currently we have an independent financial advisor and accountant, would be nice to have these two functions in the same business even if the people are not the same.

One follow call during the year to see how I am.

Contact and review business quarterly.

Having someone to review our situation from time to time to make sure things are being done the best they can be, i.e. offer advice to minimise tax etc if such a situation arises.

Give more advice on the claiming from our taxable income.

Make us more aware of the work being carried out, more transparent.

Explain what services are provided and the cost.