



ACCOUNTANTS' 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.
- Data for individual partners will also be provided if required.

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



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.

The survey covers the following key areas, eliciting client attitude and opinion about the following areas :

1. The Practice
2. The People in the Practice
3. Service and Support
4. Transition which the Practice is undertaking
5. Client preferences in relation to billing procedures
6. General comments relating to
 - The professionalism of the practice
 - The proactivity of the practice
 - The level of interest of the practice in client needs
 - How supportive the client perceives the practice to be.

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.



The Accountants' Client Survey is available at 3 levels :

A. Statistical Analysis (\$2200)

The analysis will provide you with the 'raw' data, both individual and grouped, for all responses obtained from clients responding to the survey.

B. Formal Report (\$2750)

This report, including statistical analysis, will incorporate a formal analysis of data, including discussion of KPIs and recommendations for the firm.

C. Formal Briefing (\$3300)

We will give you and your partners in a 90 minute briefing a clear understanding of the finding of the survey. This formal review will also point out what needs to be done to keep improving your firm's performance.

Pricing starts from \$2200 including GST and is dependent on the level of reporting required

We guarantee that the practice client survey will pay for itself. If you are able to keep or develop 1 key client as a result of this survey, your investment will have been worthwhile.

Just let us know if you would like to speak with an accounting firm that has conducted the survey.

For further information on how the Business Aptitude Client Survey can help you to better understand your clients, contact us on Ph +612 9904 8400.