



Best of Accounting

Next Steps & What to Expect

Presented by :

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The Best of Accounting Program

Getting Started Package

[HTTPS://WWW.INAVERO.COM/WP-CONTENT/UPLOADS/JUNE-2018-BEST-OF-ACCOUNTING-GETTING-STARTED.ZIP](https://www.inavero.com/wp-content/uploads/june-2018-best-of-accounting-getting-started.zip)

- Important dates
- Sample survey
- Sample email text
- Rules + guidelines
- Contact list templates

Prepare Your Team



Internal Staff Communication

- Partnering with Inavero
- Sample 8-Question survey
- Sample email invitation
- Dates survey will be sent
- Competition Rules

Prepare Your Clients

Let your clients know a survey is heading their way

Hi [First Name],

I'm excited to announce that [brand] has partnered with satisfaction research firm, Inavero, to see how we're doing. Over the next few days, you will receive an email from [brand] that includes a link to a short, 8-question survey that will only take you a few minutes to complete. The email address that the message will come from is survey@inavero.com. I hope you'll take this opportunity to share your input. Your feedback is crucial to helping us make decisions to improve the value of our services to you.

Thanks in advance for participating. I look forward to reading your thoughts and continuing to strengthen our partnership with you.

Sincerely,

[email_signature_name]

[email_signature_title]

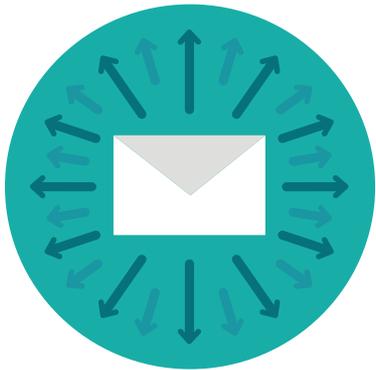
***Please note this communication is optional and is sent by your firm.**

Disclosure Note

In order to produce real, honest, actionable feedback from your clients, Inavero asks that you **do not make reference to the Best of Accounting Competition** or mention that your survey feedback will be used as part of a competition.

You are welcome to disclose further details of the competition with your internal team members, but please use your own discretion as to whom you involve because it can impact the integrity of your results if the focus becomes more about the competition than the feedback.

How it Works



Send Online Survey



Get Feedback
in Real-Time



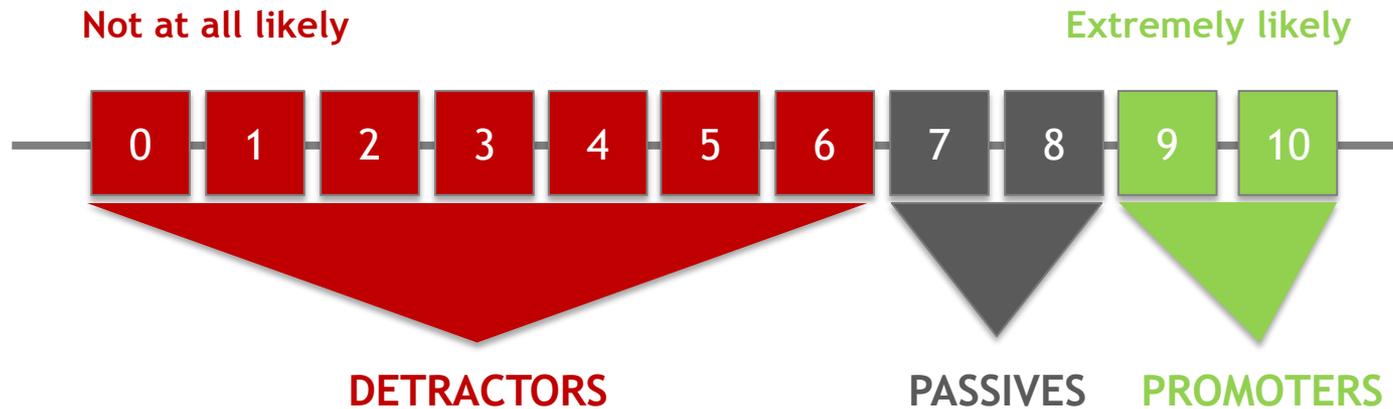
Capture
Testimonials and
Track Critical
Issues



Qualify to Earn
the Best of
Accounting
Award

Survey Methodology

Based on your most recent experience, how likely are you to recommend XZY Accounting Firm to a friend or colleague?



Survey Set Up

Who to Survey



Who to Survey

- At least 50% of the clients you've worked with over the past 3 to 12 months.

OR

- At least 500 individual client contacts.



Collect Your Survey Contacts

	A	B	C	D	E	F	G	H	I	J	K
1	brand	Partner	Practice Area	contact_type	contact_company	contact_fname	contact_lname	contact_email	contact_phone	email_signature_name	email_signature_title
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											

Include Required Fields:

- Brand
- contact_type
- contact_fname
- contact_email
- email_signature_name
- email_signature_title



Collect Your Survey Contacts

	A	B	C	D	E	F	G	H	I	J	K
1	brand	Partner	Practice Area	contact_type	contact_company	contact_fname	contact_lname	contact_email	contact_phone	email_signature_name	email_signature_title
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											

If any contact has multiple Partners who manage their account or Practice Areas you and list both in the same cell and make sure to separate them by a semicolon.

Example: Tax; Audit

Survey Set Up

Uploading your contact list



Upload Your Contact Lists

Login to: my.inavero.com

Signed into Best of Accounting Demo

[System Notifications](#) [My Account](#) [Help](#) [Sign Out](#)



[Surveys](#) [Contacts](#) [Manage](#) [My Issues](#)

Net Promoter Survey Best Practices

Best practices overview for surveying, handling detractors, and raising response rate.

External Survey Announcement

A simple email script that you can send to your survey recipients prior to the survey launch.

How to Update Bounced Email Addresses

Download and update your bounced email list.

How to Handle Unhappy Clients

Best practices to use when following up with detractors, including 5 helpful tips.

How to Get a Higher Response Rate

Sample scripts you can use when reaching out to non-responders.

Best of Accounting Demo Summary

This is an overview of your satisfaction metrics across all surveys for Best of Accounting Demo. You can view detailed metrics by clicking on a single survey below.

Setup Your Surveys

<p>Best of Accounting</p> 			<p>Get Started</p>
---	--	--	--------------------

Best of Accounting

[Historical Reports](#) ▾

<p>Best of Accounting 2017 <i>Survey opens May 31, 2017</i></p>	<p>No survey responses available to graph.</p>	<p>NPS: -- RR: --</p>	<p>View Survey ▶</p>
---	--	---------------------------	--------------------------------------



Upload Your Contact Lists



Add Contacts

Get started by uploading your list of Contacts to be surveyed.

[+ Add Contacts](#)

or finish later



Upload Brand Logos

You'll need to upload a logo for each of your **0** brands. Let's get some uploaded now.

[Upload Brand Logos](#)



Confirm & Submit

We're almost done! There are a few more things you need to read and agree to, then your job is done for this survey.



Upload Your Contact Lists



Uploading Contacts

[Get Help](#)

1: Select Survey & Upload File

CHOOSE SURVEY: [Show All Surveys](#)

Best of Accounting - Best of Accounting 2016

CHOOSE CSV: [What's a CSV?](#)

No file selected... [Select File](#)

CHOOSE UNIQUENESS GROUPS: [What are Uniqueness Groups?](#)

Select uniqueness groups

[Go Back](#) [Upload & Continue](#)

*Make sure you save your contact list as a .CSV

2: Validate File Columns

3: Analyze File

4: Validate Units & Tags

5: Summary & Confirm

6: Create Contacts





Upload Your Contact Lists



Uploading Contacts

[Get Help](#)

1: Select Survey & Upload File

2: Validate File Columns

3: Analyze File

4: Validate Units & Tags

5: Summary & Confirm

83 Valid Contacts [Download CSV](#)

Name	Email Address	
Gerald Clinton	gerald.clinton5@demoemail.com	View
Pat Kennedy	pat.kennedy2@demoemail.com	View
Eliza Nixon	eliza.nixon32@demoemail.com	View
Mary Nixon	mary.nixon12@demoemail.com	View
Eliza Truman	eliza.truman9@demoemail.com	View

5 per page

[« Prev](#) [1 - 5 of 83](#) [Next »](#)

Page [1](#) of 17

This upload contains **0 new tags**

[Submit Valid Contacts](#)

[Start Over](#)

6: Create Contacts





Upload Your Contact Lists



Add Contacts

Get started by uploading your list of Contacts to be surveyed.

[+ Add Contacts](#)

You've got **83** contacts so far.



Upload Brand Logos

We customize your surveys with your company and brand logo. Let's get one uploaded now.

[Upload Brand Logos](#)

or finish later



Confirm & Submit

We're almost done! There are a few more things you need to read and agree to, then your job is done for this survey.



Manage Your Brand

Use this screen to add and modify your Brand and corresponding logo for your surveys.

Current Brand

Logo	Brand	Actions
No Brand Logo Upload	Brand Name	Edit Preview Delete

[Save Step >](#)





Upload Your Contact Lists



Add Contacts

Get started by uploading your list of Contacts to be surveyed.

+ Add Contacts

You've got **83** contacts so far.



Upload Brand Logos

We customize your surveys with your company and brand logo. Let's get one uploaded now.

🔄 Reupload Logo

Looking good!



Confirm & Submit

We're almost done! There are a few more things you need to read and agree to, then your job is done for this survey.

[Review Agreement](#)

or finish later



1. Confirm Brand Name

This is your last chance to make changes to your brand name!

If you are awarded Best of Accounting we will display your winning brand exactly as it is seen below and we are unable to change it after this point.

Your Brand	Contacts In Brand
Brand Name	83 Contacts

I verify that the above brand name is correct.

[Manage Brands](#)

2. Choose Your Primary Practice Area

If you are awarded Best of Accounting we will display your winning brand under the practice area selected below.

If you are unsure which practice area to select for your brand select "I don't know" below and contact your Inavero Account Manager when you are ready to make the selection.

Your Brand	Practice Area Selection
Brand Name You have selected: 0 out of 1 practice area.	<input type="checkbox"/> I Don't Know <input type="checkbox"/> Audit / Assurance <input type="checkbox"/> Business Tax <input type="checkbox"/> Business Valuation <input type="checkbox"/> Consulting <input type="checkbox"/> Other <input type="checkbox"/> Personal Tax

[Go Back](#)

[Complete Survey Setup](#)





Upload Your Contact Lists



1. Confirm Brand Name

This is your last chance to make changes to your brand name!

If you are awarded Best of Accounting we will display your winning brand exactly as it is seen below and we are unable to change it after this point.

Your Brand	Contacts In Brand
Brand Name	83 Contacts

I verify that the above brand name is correct.

[Manage Brands](#)

* Check the verify brand box

2. Choose Your Primary Practice Area

If you are awarded Best of Accounting we will display your winning brand under the practice area selected below.

If you are unsure which practice area to select for your brand select "I don't know" below and contact your Inavero Account Manager when you are ready to make the selection.

Your Brand	Practice Area Selection
Brand Name You have selected: 0 out of 1 practice area.	<input checked="" type="checkbox"/> I Don't Know <input type="checkbox"/> Audit / Assurance <input type="checkbox"/> Business Tax <input type="checkbox"/> Business Valuation <input type="checkbox"/> Consulting <input type="checkbox"/> Other <input type="checkbox"/> Personal Tax

[Go Back](#)

[Complete Survey Setup](#)





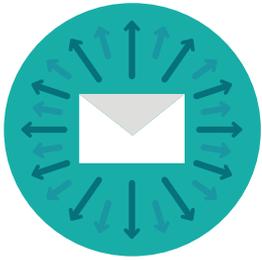
Upload Your Contact Lists



You're All Done!

[Back to my Surveys](#)

Survey Experience



Personalized Email Message

From: [Brand]

Subject: [Brand] - 8 Question Survey

Dear [fname],

Your opinion is important to us. Please help us improve by completing a quick, eight question survey on your recent experiences with our firm.

Please click the following link now to begin the survey:

[link]

(Please note: If you have problems loading the survey, you may also copy the entire link into your web browser.)

For your time, you will be entered into a drawing for a **\$150 debit card upon submitting the survey.** If you are unable to accept a corporate gift, [brand] will make a charitable contribution in your honor. Arrangement for the donation will be made once the winner has been selected and notified.

By taking time to share a few thoughts with us on your experience, you are helping us discover ways to improve the service we provide you.

Thank you in advance for your time.

Sincerely,

[email_signature_name]
[email_signature_title]

This survey was sent to you by Inavero on behalf of [BRAND]. If you have any questions or problems with the survey, please contact Inavero at 800-921-2640, or by email at survey@inavero.com.

Please read our [Privacy Policy](#) and [Official Drawing Rules](#). To unsubscribe from all future surveys conducted by Inavero, please click here: [\[unsubscribe\]](#)



8-Question Survey



← Your logo here

Satisfaction Survey

Based on your most recent experience how likely are you to recommend Brand Name to a friend or colleague?

Not at all likely

Extremely likely

0 1 2 3 4 5 6 7 8 9 10 Don't Know

My phone calls and emails are _____ returned within 24 hours.

- Always
- Sometimes
- Never

Brand Name _____ delivers high quality, error-free work.

- Always
- Sometimes
- Never

8-Question Survey

1. Based on your most recent experience how likely are you to recommend [Brand] to a friend or colleague?
(Scaled 0 - 10, Don't Know, N/A)
2. My phone calls and emails are _____ returned within 24 hours.
(Always, Sometimes, Never, N/A)
3. [Brand] _____ delivers high quality, error-free work.
(Always, Sometimes, Never, N/A)
4. The firm's services are _____ a good value, given the cost.
(Always, Sometimes, Never, N/A)
5. [Brand] _____ has a thorough understanding of my needs.
(Always, Sometimes, Never, N/A)
6. [Brand] is _____ proactive in their approach to helping me.
(Always, Sometimes, Never, N/A)
7. What is the primary reason behind the ratings you provided?
(Open end)
8. What is one thing we could be doing differently to increase the value you receive from us?
(Open end)



Testimonials & Shout Outs

We're thrilled you had such a positive experience. May we use your feedback as a testimonial?

- No, keep my feedback private
- Yes, but without my name and company
- Yes, including my name and company

If you would like to create a different response for your testimony, please update it below.

Quick response time and helpful team. They also offer me a beer when I stop by the

Submit

Thank You!

Your survey is complete, but we have two more quick optional questions for you.

Has an employee of NPS Demo gone above and beyond for you?

Fill out the form below and they will be rewarded and recognized in front of their peers for a job well done!

Employee Name (required)

What did they do to go above and beyond for you?

(This will be shared with them and the rest of our company)

Send

Would you help us spread the word through the following social networks?



Survey Powered By

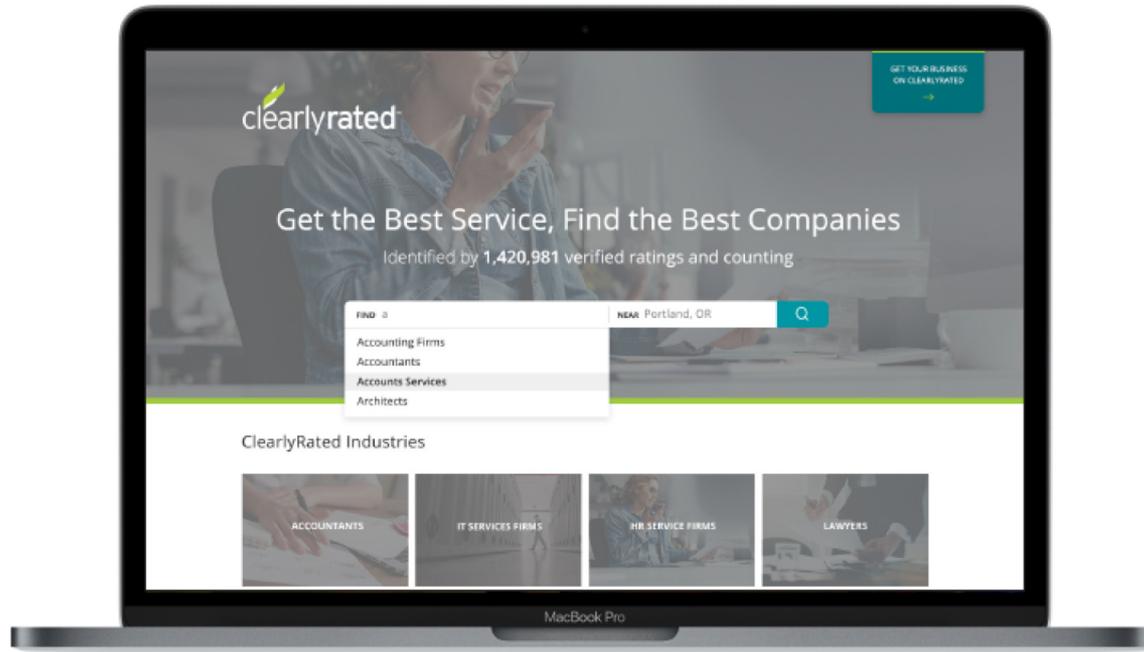
inavero

If you have a problem with the survey you can contact [Inavero](#) for help.

Introducing ClearlyRated



Coming this July!





Testimonials Go Live in July

The screenshot shows the ClearRated website interface. At the top, there's a search bar with "Staffing Firms, Accountants, IT Services" and "Portland, OR". Below the search bar, the company name "Your Company Name" is displayed with a logo placeholder and "of PORTLAND, OR". There are sections for "CLIENT RATINGS" (5.0 based on 0 ratings), "GET IN TOUCH" (with a "VISIT THEIR WEBSITE" button), and "TESTIMONIALS". The testimonials section has a dropdown menu for "About This Location" and displays two placeholder testimonials, each followed by a date: "A COURT in DECEMBER 19, 2017".

This is a close-up view of the testimonial content area. It shows three placeholder testimonials, each consisting of a paragraph of Lorem Ipsum text and a date: "A COURT in DECEMBER 19, 2017". Below the testimonials, there is a pagination control showing "Showing 1-10 of 118" with "previous" and "next" buttons.

Real-Time Reporting in MyInavero



Receive Reports & Updates on the Feedback

NPS Drivers

		<u>Overview</u>	NPS Impact	Response Details
Topic ^	Full Question	Always ^		Responses ^
Q1: Responsiveness	My phone calls and emails are _____ returned within 24 hours.	55.6%		36
Q2: Quality	[brand] _____ delivers high quality, error-free work.	44.4%		36
Q3: Value	The firm's services are _____ a good value, given the cost.	55.6%		36
Q4: Needs	[brand] _____ has a thorough understanding of my needs.	47.2%		36
Q5: Proactive	[brand] is _____ proactive in their approach to helping me.	51.4%		36



Receive Reports & Updates on the Feedback

myinavero

Surveys Contacts Manage My Issues

Benchmarks Reports Preview

Practice Areas

Search

Overview NPS Response Rate Issues

	NPS [▲]	Response Rate [▲]	Flagged [▼]
Audit	100%	28.1%	--
Consulting	53.8%	34.2%	2
Corp. Tax	100%	47.6%	--
Personal Tax	100%	36.8%	--

Offices

Search

Overview NPS Response Rate Issues

	NPS [▲]	Response Rate [▲]	Flagged [▼]
Alexandria, VA	100%	50%	--
Boston, MA	100%	45%	--
Buffalo, NY	100%	28.6%	--
Miami, FL	33.3%	25%	1



Receive Reports & Updates on the Feedback

[Overview](#) / [Best of Accounting](#)

[Benchmarks](#) [Reports](#) [Preview](#)

Best of Accounting

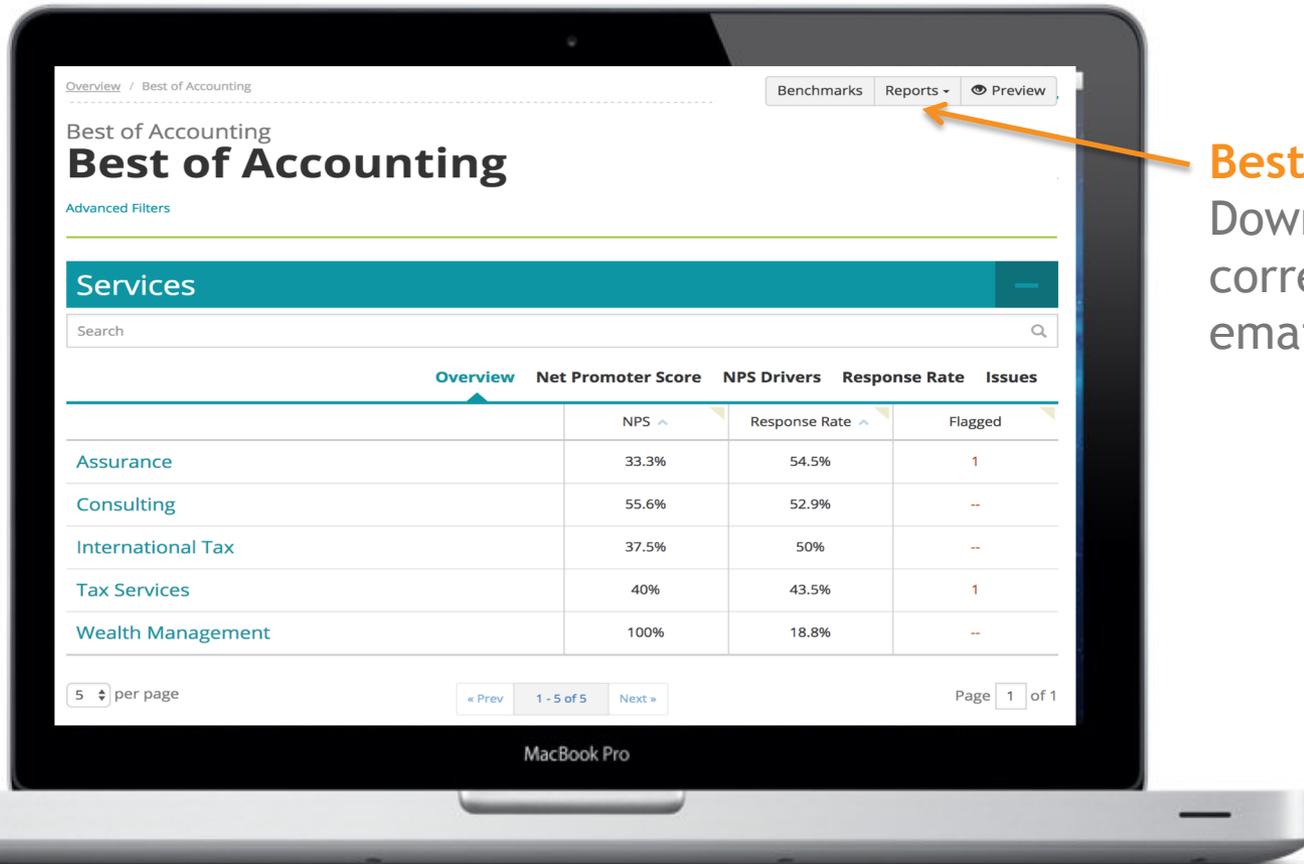
Best of Accounting

[Advanced Filters](#)

Responses					
Search Responses <input type="text"/>					
NPS	Respondent	Response <input type="text" value="Comment Question"/>	Date	Flagged	Trend
10	Gerald Nixon <i>Studebaker</i>	Excellent service by our contact. She's very on top of things!	May 1, 2015		
4	Gerald Nixon <i>Pan Am</i>	The communication was very poor. I did not feel as if my time was important.	May 1, 2015		
7	Gerald Nixon <i>Studebaker</i>	No Answer	May 1, 2015		
9	Pat Kennedy <i>Pets.com</i>	Great partner	May 1, 2015		
10	George Garfield <i>Pan Am</i>	Timely response and availability to meet our needs.	May 2, 2015		



View & Download Reports



Best Practice*
Download and correct bounced emails.



Receive Reports & Updates on the Feedback

New Detractor Response!

Lauren Birtwhistle No Change

Sales Manager: Bridget Harper
Email: lauren.birtwhistle@inavero.com
Phone: None
Company: Inavero
Tags: None

Based on your most recent experience, how likely is it that you would recommend us to a friend or colleague?

4

What is the primary reason behind the rating you provided?
Needed more communication and email templates.

What is one thing we could be doing differently to increase the value of our services to you?
Provide more tutorials.

Choose a resolution after following up:

[Resolution in Progress](#) | [Can't Resolve](#) | [Not an Issue](#) | [Resolved](#) | [Escalate](#)

Best Practice* Have a plan to follow up with detractors before the survey is sent. Your account manager will provide a resource with scripts and tips for this step.



Manage Issue Resolutions

Issue Resolution

Nov 4, 2014

James Garfield submitted a response in survey "Enterprise"

SET ISSUE STATUS

Select Status

- Resolution in Progress
- Can't Resolve
- Not an Issue
- Resolved
- Escalate

Type in some notes... (required)

Create Issue

Best Practice*

Download the MyIssues guide from the resource section of Inavero.com and have a plan in place before your survey sends.

Award Eligibility



Competition Rules

- Regardless of intent, do not take survey on behalf of your clients
- Regardless of intent, do not survey internal employees.
- Regardless of intent, never tell your clients the survey is to qualify you for a competition.
- Regardless of intent, do not remove any clients from your list.
- Regardless of intent, do not use the award logo without permission.
- Regardless of intent, surveys may not be completed on a computer that is owned or under the control of your company.

Response Rate Requirement



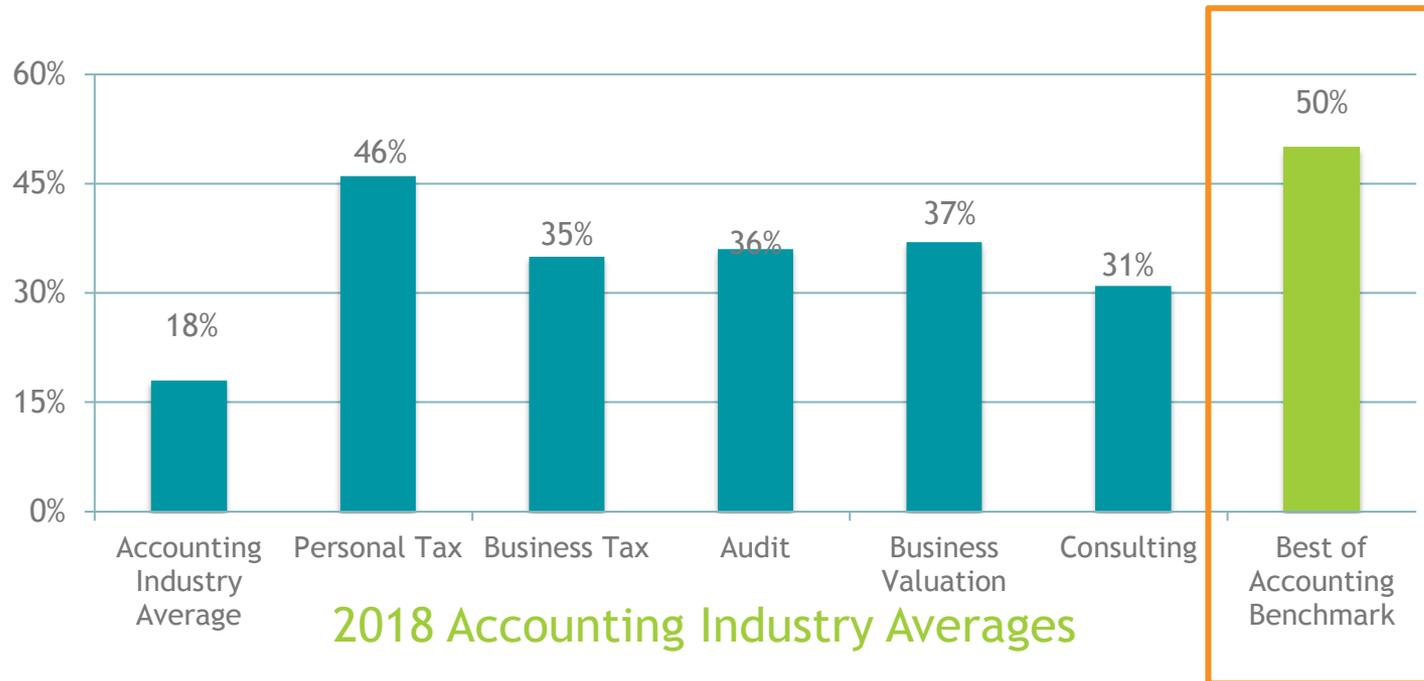
20% response rate AND 15 responses per brand

OR

250 total responses



NPS Requirement





Winners Resources

	Basic	Premium	Plus	Enterprise
Best of Accounting Marketing Guide w/ press release template, social media tools	✓	✓	✓	✓
 Award logo		✓	✓	✓
ClearlyRated.com Profile Page with firm contact information and link to website	✓	✓	✓	✓
ClearlyRated.com Profile Page with testimonials and star ratings		✓	✓	✓

MyInavero Access

Your online survey dashboard

Login URL: <https://my.inavero.com>

Please Login

← → ↻ <https://my.inavero.com/login> ★ ☰

my inavero

Log Into Your Account

EMAIL ADDRESS

PASSWORD

[I forgot my password!](#)

What's MyInavero?
A real-time satisfaction survey results dashboard for Inavero clients. [Contact us](#) to learn more about satisfaction surveying with Inavero.

* Select "I forgot my password"

Password Setting & Login

Your Password Reset Inbox x



Inavero

to me

4:22 PM (0 minutes ago) ☆



Hi Liz -

We have processed your password reset request! Click the link below to set your new password:

https://my.inavero.com/set_password/259/BXbhX5vTFxvBf2zvaktDTg9DXjik6gkr3cbq5oEmR4VXRLFE2oZ

If you have any other questions or comments please do not hesitate to contact our survey support at [1-800-921-2640](tel:1-800-921-2640) or reply to this email.

Thank you,

Inavero

Password Setting & Login



Update Your Password

Your password needs to be at least eight characters long, have both upper and lower case letters and contain at least one number.

NEW PASSWORD

CONFIRM PASSWORD

[Back to login](#)

Update Password

Manage your user settings

- Add new account users user Manage > Users
- Email settings are different than your critical response emails
- Key contacts default to receive an email notification when you receive a detractor response or Shout Out *

Signed into Best of Staffing 2015 Demo My Account Help Sign Out

myinavero Surveys Contacts Manage

Users Brands Social

Quick Links

- Administrator
- Standard User
- Limited User
- Notification-Only User

Manage Users

Use this screen to add, modify or remove users.

Administrator

Name	Reporting Unit Access	
Lauren Petersen <small>Last Login: seconds ago</small>	Overall	Actions ▾

Add Administrator

10 per page < Prev 1 - 1 of 1 Next > Page 1 of 1

Standard User

Name	Reporting Unit Access	
------	-----------------------	--

Add Standard User

Limited User

Name	Reporting Unit Access	
------	-----------------------	--

Add Limited User

Notification-Only User

Name	Reporting Unit Access	
------	-----------------------	--

Add Notification-Only User

* Email notifications are available for Premium, Plus & Enterprise package levels

Manage your user settings

Signed into Best of Accounting Demo System Notifications My Account Help Sign Out

myinavero Surveys Contacts Manage My Issues

Quick Links

- Personal Information
- Reporting Structure Access
- Notifications

Liz Wackerle / My Account

Personal Information

FIRST NAME	LAST NAME	CURRENT PASSWORD
<input type="text" value="Liz"/>	<input type="text" value="Wackerle"/>	<input type="password"/>
LAST NAME	EMAIL ADDRESS	NEW PASSWORD
<input type="text" value="Wackerle"/>	<input type="text" value="liz.wackerle+bestofaccountingdemo@inavero.com"/>	<input type="password"/>
EMAIL ADDRESS	TITLE	REPEAT NEW PASSWORD
<input type="text" value="liz.wackerle+bestofaccountingdemo@inavero.com"/>	<input type="text"/>	<input type="password"/>
TITLE	PHONE	<input type="button" value="Update Password"/> <input type="button" value="Reset Password"/>
<input type="text"/>	<input type="text"/>	
PHONE	MAILING ADDRESS	<div>Copy Password Reset Link <input type="button" value="Create Reset Link"/></div>
<input type="text"/>	<input type="text"/>	
MAILING ADDRESS	<input type="button" value="Save Information"/>	
<input type="text"/>		

Reporting Structure Access

Overall Remove Access

GRANT LIZ ACCESS TO

Notifications

Set Globally Set Individually

Responses <i>Alert me when respondent...</i>	<input type="checkbox"/> Rates satisfaction <input type="text" value="6 or lower"/>
	<input type="checkbox"/> Provides a Don't Know answer
	<input type="checkbox"/> Provides an N/A answer
	<input type="checkbox"/> Provides a shout out
Issues <i>Alert me when...</i>	<input type="checkbox"/> An issue is escalated
	<input type="checkbox"/> An issue is changed

Access your account settings

Update notifications

Resources over the next two weeks

- Inavero.com Resource section
- MyInavero Survey Dashboard
- Your Account Manager
- Weekly updates on response rate and NPS

The screenshot shows the myinavero dashboard. The top navigation bar includes 'Surveys', 'Contacts', 'Manage', and 'My Issues'. The main content area is titled 'Best of Accounting Demo Summary' and provides an overview of satisfaction metrics. A sidebar on the left contains several resource links, which are highlighted with an orange border in the image. The main content area features a table of survey results for 'Best of Accounting' across three years (2014, 2015, 2016) and a 'Lifetime Average'. Each row includes a bar chart, NPS and RR percentages, and a 'View Results' link. At the bottom, there are pagination controls and a 'Recalculate old NPS/RR' button.

myinavero Surveys Contacts Manage My Issues

Best of Accounting Demo Summary

This is an overview of your satisfaction metrics across all surveys for Best of Accounting Demo. You can view detailed metrics by clicking on a single survey below.

Best of Accounting

Historical Reports ▾

Best of Accounting 2016 <i>Survey Closes Dec 31, 2017</i>		NPS: 51.4% RR: 42.2%	View Results >
Best of Accounting 2015 <i>May 1, 2014 - Oct 13, 2016</i>		NPS: 54.5% RR: 46.5%	View Results >
Best of Accounting 2014 <i>May 1, 2013 - Jan 20, 2016</i>		NPS: 34.5% RR: 47.5%	View Results >
Lifetime Average		NPS: 45.6% RR: 47.9%	

5 per page « Prev 1 - 3 of 3 Next »

Page 1 of 1

Recalculate old NPS/RR

Net Promoter Survey Best Practices
Best practices overview for surveying, handling detractors, and raising response rate.

External Survey Announcement
A simple email script that you can send to your survey recipients prior to the survey launch.

How to Update Bounced Email Addresses
Download and update your bounced email list.

How to Handle Unhappy Clients
Best practices to use when following up with detractors, including 5 helpful tips.

How to Get a Higher Response Rate
Sample scripts you can use when reaching out to non-responders.

How to Download your Non-Response list
How to download your current non-response list.

2-1-1 Follow Up Template
Email template we can send to everyone you asked to participate in the survey.

Key Dates to Remember

Contact list due - Wednesday, May 16th

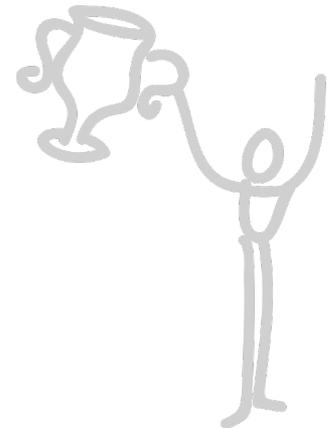
Survey Launch - Wednesday, June 6th

Survey Reminder - Thursday, June 14th

**reminders sent to clients who have not yet completed the survey, only*

Survey Closes - Wednesday, June 20th

ClearlyRated Launches - Early July



Questions?

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503.542.3346

Lauren.petersen@inavero.com

Ryen Salo
Sr. Account Manager
503.542.3340

Ryen.salo@inavero.com