



# Best of Accounting

## Next Steps & What to Expect

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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](mailto: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]

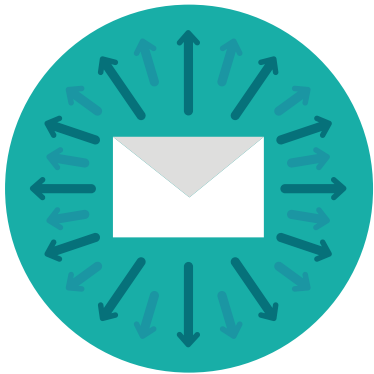
**\*Please note this communication is optional and is sent by your firm.**

# 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



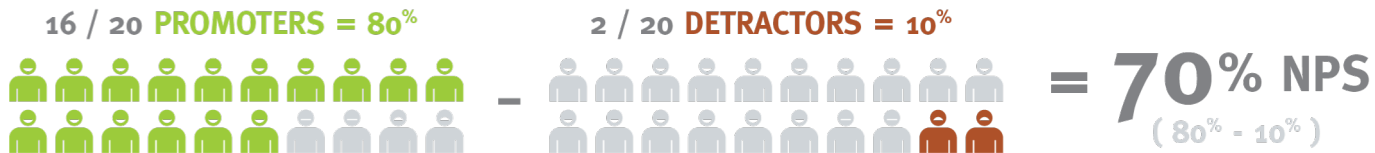
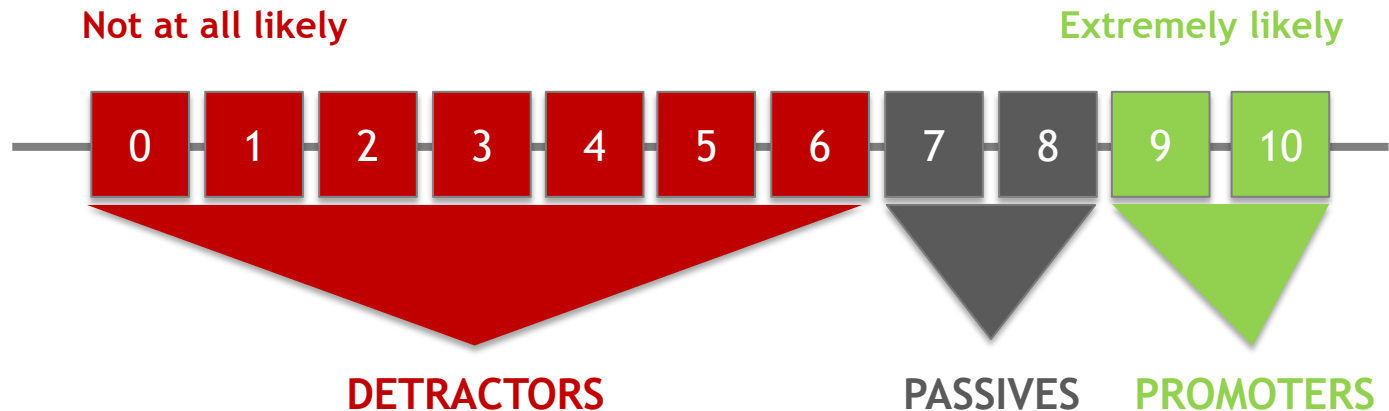
Capture  
Testimonials and  
Track Critical  
Issues



Qualify to Earn  
the Best of  
Accounting  
Award

# Survey Methodology

Based on your most recent experience, how likely are you to recommend XYZ 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](https://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

Best of Accounting



[Get Started](#)

### Best of Accounting

[Historical Reports ▾](#)

**Best of Accounting 2017**

*Survey opens May 31, 2017*

*No survey responses available to graph.*

NPS: —  
RR: —

[View Survey >](#)



# 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	<a href="#">View</a>
Pat Kennedy	pat.kennedy2@demoemail.com	<a href="#">View</a>
Eliza Nixon	eliza.nixon32@demoemail.com	<a href="#">View</a>
Mary Nixon	mary.nixon12@demoemail.com	<a href="#">View</a>
Eliza Truman	eliza.truman9@demoemail.com	<a href="#">View</a>

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

**BEST of**  
**Accounting**  
powered by inavero

**BEST of**  
**Accounting**  
powered by inavero



## 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	<a href="#">Edit</a> <a href="#">Preview</a> <a href="#">Delete</a>

[Save Step](#) >

**BEST of**  
**Accounting**



# 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 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



## 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

\* Check the verify brand box

☒ 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 checked="" type="checkbox"/> <b>I Don't Know</b> <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](#)







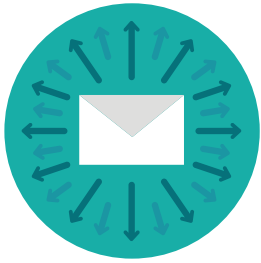
# Upload Your Contact Lists



**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.

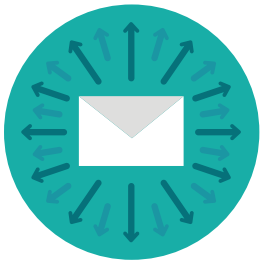
Sincerely,

[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](mailto: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

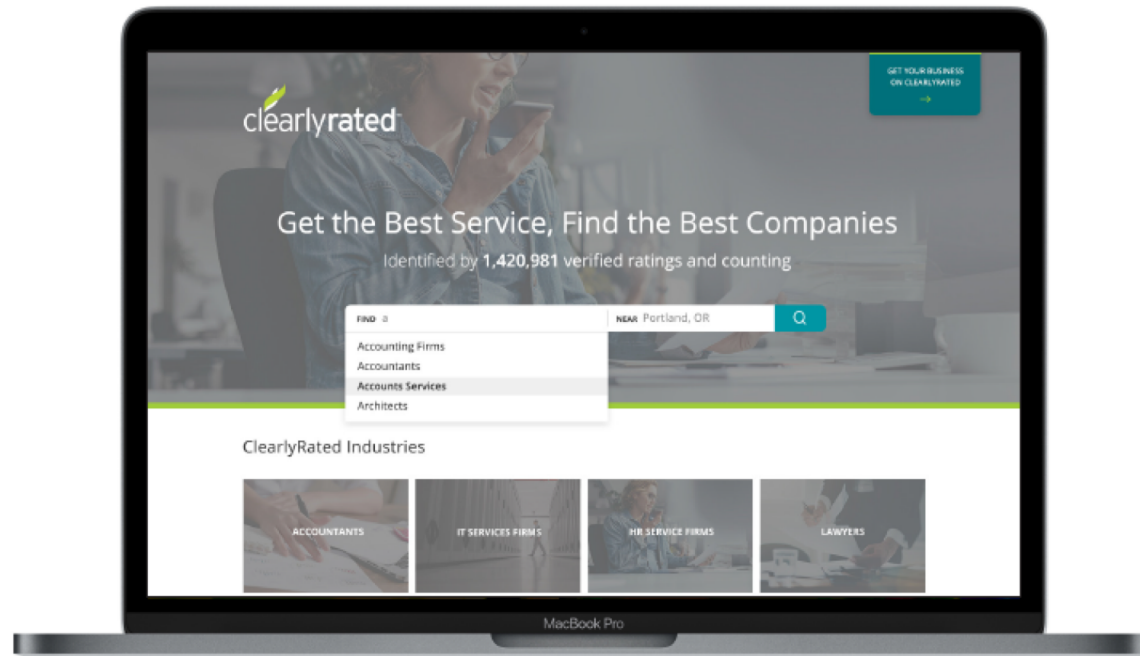
**inavero**

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

# Introducing ClearlyRated



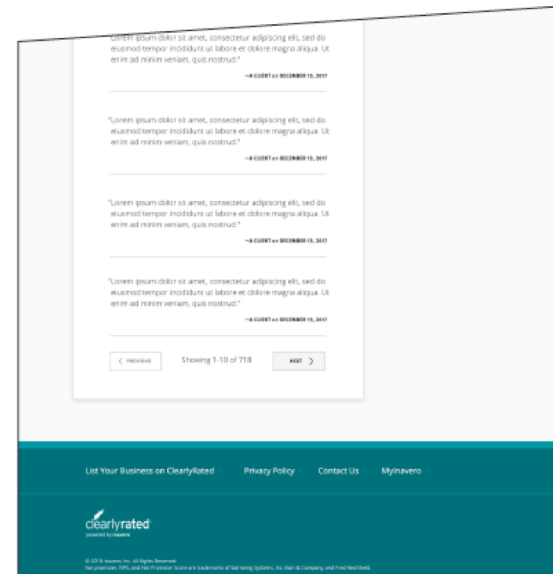
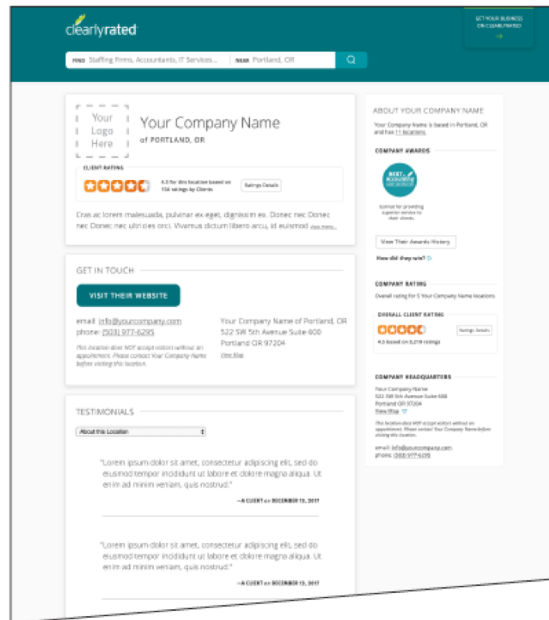
# Coming this July!







# Testimonials Go Live in July



# 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 <span>Q</span>					
NPS <span>▲</span>	Respondent <span>▲</span>	Response <span>Comment Question</span> ▾	Date <span>▲</span>	Flagged <span>▲</span>	Trend <span>▲</span>
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

Overview / Best of Accounting

Benchmarks Reports Preview

## Best of Accounting

Advanced Filters

### Services

Search

Overview	Net Promoter Score	NPS Drivers	Response Rate	Issues
	NPS ^	Response Rate ^	Flagged	
Assurance	33.3%	54.5%	1	
Consulting	55.6%	52.9%	--	
International Tax	37.5%	50%	--	
Tax Services	40%	43.5%	1	
Wealth Management	100%	18.8%	--	

5 per page

« Prev 1 - 5 of 5 Next »

Page 1 of 1

**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](mailto: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



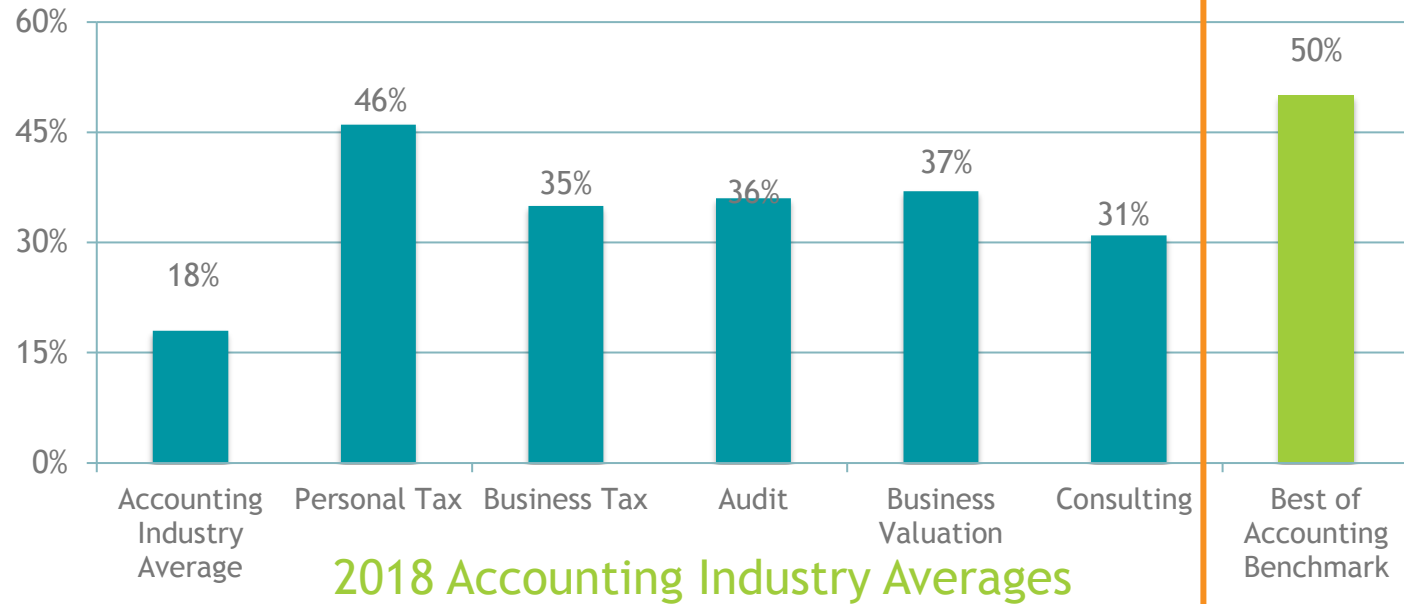
20% response rate AND 15 responses per brand

**OR**

250 total responses



# NPS Requirement





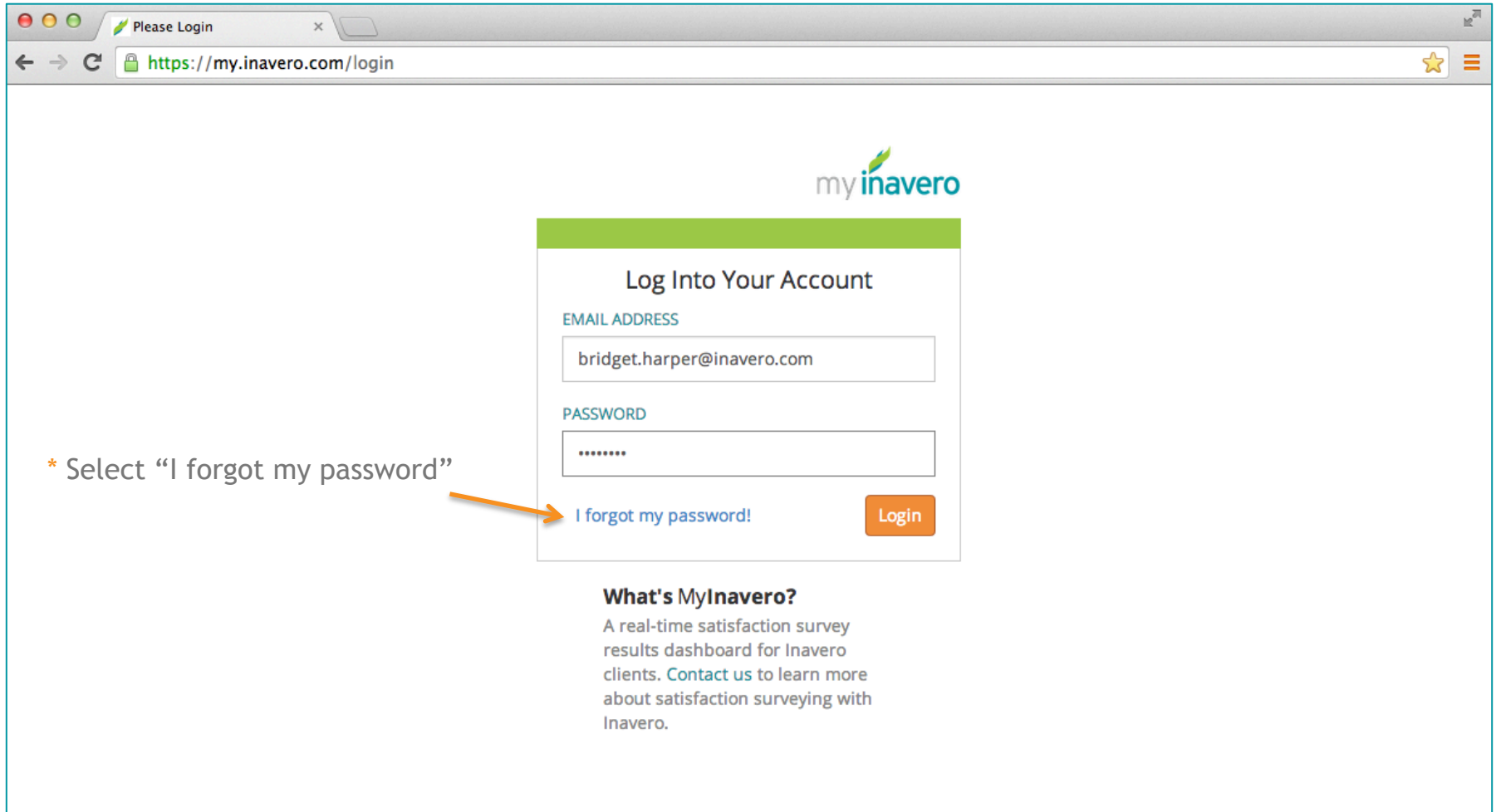
# Winners Resources

	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>



A screenshot of a web browser window showing the login page for my.inavero.com. The browser's address bar displays the URL <https://my.inavero.com/login>. The page features the my.inavero logo at the top right. The main content area is a white box with a green header bar. Inside this box, the title "Log Into Your Account" is centered. Below the title, there are two input fields: "EMAIL ADDRESS" containing the text "bridget.harper@inavero.com" and "PASSWORD" containing a masked password "\*\*\*\*\*". To the left of the password field, there is a link "I forgot my password!" with an orange arrow pointing to it from the text "\* Select 'I forgot my password'" located to the left of the login form. To the right of the password field is an orange "Login" button. Below the login form, there is a section titled "What's MyInavero?" followed by a paragraph: "A real-time satisfaction survey results dashboard for Inavero clients. [Contact us](#) to learn more about satisfaction surveying with Inavero."

Please Login

<https://my.inavero.com/login>

my inavero

Log Into Your Account

EMAIL ADDRESS

bridget.harper@inavero.com

PASSWORD

\*\*\*\*\*

\* Select "I forgot my password"

[I forgot my password!](#)

Login

**What's MyInavero?**

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

# 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/BXbhX5vTFxBf2zvaktDTg9DXjik6gkr3cbq5oEmR4VXRLFE2oZ](https://my.inavero.com/set_password/259/BXbhX5vTFxBf2zvaktDTg9DXjik6gkr3cbq5oEmR4VXRLFE2oZ)

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 ▾
<a href="#">Add Administrator</a>		

10 per page [« Prev](#) 1 - 1 of 1 [Next »](#) Page 1 of 1

Standard User		
Name	Reporting Unit Access	
<a href="#">Add Standard User</a>		

Limited User		
Name	Reporting Unit Access	
<a href="#">Add Limited User</a>		

Notification-Only User		
Name	Reporting Unit Access	
<a href="#">Add Notification-Only User</a>		

\* 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  
Liz

LAST NAME  
Wackerle

EMAIL ADDRESS  
liz.wackerle+bestofaccountingdemo@inavero.com

TITLE

PHONE

MAILING ADDRESS

CURRENT PASSWORD

NEW PASSWORD

REPEAT NEW PASSWORD

Update Password Reset Password

Copy Password Reset Link  
Create Reset Link

Save Information

### Reporting Structure Access

Overall Remove Access

GRANT LIZ ACCESS TO (Start typing a Reporting Unit) Update Access

### Notifications

Set Globally Set Individually

Responses Alert me when respondent...

- ☐ Rates satisfaction 6 or lower
- ☐ Provides a Don't Know answer
- ☐ Provides an N/A answer
- ☐ Provides a shout out

Issues Alert me when...

- ☐ An issue is escalated
- ☐ An issue is changed

Update Notifications

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



# Key Dates to Remember

Contact list due - Wednesday, May 16th

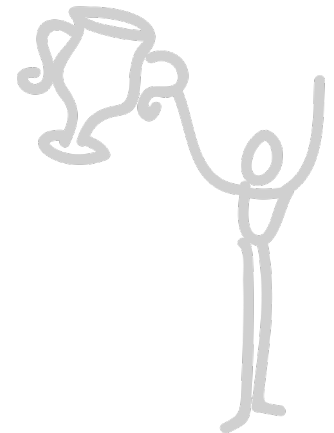
Survey Launch - Wednesday, June 6th

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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