

ClearlyRated® for Accounting Firms

Measure the client experience.
Build online reputation.
Differentiate on service quality.



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Who is ClearlyRated?

Headquartered in Portland, Oregon, ClearlyRated is a team of men and women who believe it's good business for professional service providers to place the client experience at the heart of their growth strategy.

To that end, we're on a mission to help accounting firms credibly differentiate themselves based on the service they provide.

What is ClearlyRated®?

The ClearlyRated client experience program blends a short client satisfaction survey with an online profile highlighting star ratings and testimonials earned by the firm. Imagine if JD Power & Associates had a love child with Glassdoor.com, and you see where we're going.

What is "Best of Accounting™"?

Participating firms are eligible to earn ClearlyRated's annual "Best of Accounting" award for service excellence. Winners are publicly acknowledged for their service accomplishments and are listed on ClearlyRated.com.

INDUSTRY PARTNERS



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clearlyrated.com/solutions →

The Net Promoter® Methodology

The ClearlyRated accounting client survey uses the Net Promoter Score (NPS®) methodology. NPS is a simple metric based on the question “How likely are you to recommend our company to a friend or colleague?” The question is answered on a 0-10 scale with ten being extremely likely to recommend and zero being not at all likely.

Responses to this question are divided into three categories:



DETRACTORS

Give a rating of 0-6



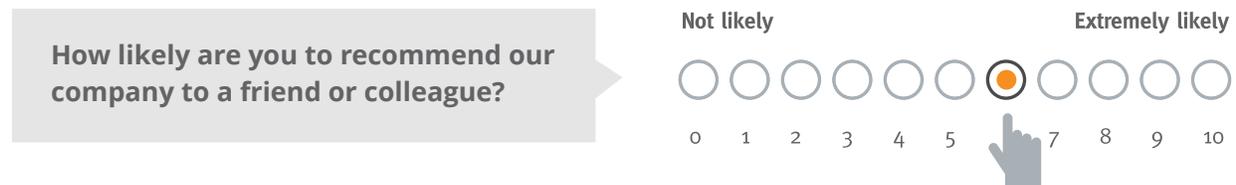
PASSIVES

Give a rating of 7-8



PROMOTERS

Give a rating of 9-10



NPS is calculated by subtracting the percentage of detractors from the percentage of promoters:

16 / 20 **PROMOTERS = 80%**

2 / 20 **DETRACTORS = 10%**



= 70% NPS (80% – 10%)

What Our Clients Say

“ClearlyRated is by far the most responsive, consultative, personable, and professional vendor partner with whom I have had the pleasure of working. Their team goes above and beyond to offer us sound advice and always provides feedback that makes us shine as new NPS advocates. The software is superior to any of the applications we explored as part of our due diligence. The UX can’t be beat. The processes are streamlined and can be seamlessly executed. The reporting is clean and concise. The price is easily justified, and the fact that the teams intimately understand my market offers a tremendous added value.”

**JENNIFER ALTERWITZ**

Vice President Marketing & Communications, SC&H Group | Moore Stephens

“The ClearlyRated team is great to work with! My account manager answers every question so quickly (and patiently)! Second, the process was easy and smooth! Finally, the results are amazing and watching them update live is the best!”

**KAREN RASHID**

Marketing Manager, RP&B CPAs

“Not only is the ClearlyRated survey straightforward, effective, and minimally demanding on my clients’ time, but the ClearlyRated team is top-notch. Customer service is always their number one priority: where possible they are quick to accommodate any changes or requests we have, are very responsive to any questions, take ownership and provide speedy resolutions if something is not right, and basically make me feel like their most important customer ever! I honestly don’t know if I have a better working relationship with any of my professional vendors or contacts than I do with my ClearlyRated team. Great product; great people. I would and do recommend ClearlyRated!”

**NICOLA FLEMING**

Marketing Manager, Perkins & Co. | BDO

How It Works



Measure client satisfaction with Net Promoter® Score

NPS is a single metric that allows accounting firms to measure and grow client satisfaction and service quality across their firm.



Celebrate service wins and tackle client issues

Shout out notifications allow clients to recognize members of your team that have gone above and beyond the call of duty, while issue tracking helps you address client concerns before they become client churn.



Build online reputation with ratings and testimonials

NPS scores are validated and translated into a 5-star client rating, which will populate real-time on your firm's ClearlyRated.com profile (along with testimonials from clients who love you).



Win a third-party award for client satisfaction

Qualifying firms receive an accredited industry award, based exclusively on ratings provided by your clients, to help you demonstrate your commitment to client satisfaction and differentiate from the competition.



Grow your business on a foundation of service excellence

Surveying your clients is not a new idea. But investing in an industry-validated survey program designed specifically to help your firm foster a culture of service excellence and leverage client feedback for growth — that's the promise of ClearlyRated.

8-Question Client Survey

This is a preview of the survey that your clients will receive. On average, accounting firms that survey clients through ClearlyRated see a 32% response rate.



This Net Promoter® Score (NPS) question is the globally recognized survey question that determines a client's level of loyalty to your firm. This metric determines if your firm earns the Best of Accounting™ award.

After a decade of client satisfaction research for professional service firms, ClearlyRated has identified these 5 key drivers of client satisfaction.



Satisfaction Survey

Based on your most recent experience, how likely is it that you would recommend Your Brand 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

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

Always
 Sometimes
 Never

The firm's services are _____ a good value, given the cost.

Always
 Sometimes
 Never

Your Brand _____ has a thorough understanding of my needs.

Always
 Sometimes
 Never

Your Brand is _____ proactive in their approach to helping me.

Always
 Sometimes
 Never

What is the primary reason behind the rating you provided?

What is one thing we could be doing differently to increase the value you receive from us?

Initial Email Invitation Sent to Clients

Dear [fname],

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

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

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

(0 – Not at all likely and 10 – Extremely likely)

(Please note: clicking selection above will direct you to the rest of the survey)

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 ClearlyRated on behalf of [Brand]. If you have any questions or problems with the survey, please contact ClearlyRated at 800-921-2640, or by email at survey@clearlyrated.com

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

Who to Survey

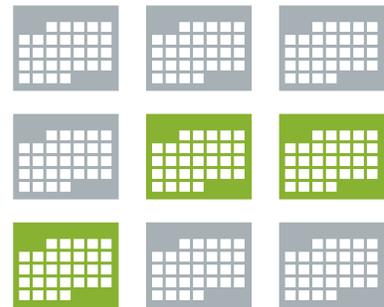
Surveying your clientele with ClearlyRated grants your firm eligibility to win the annual Best of Accounting™ award for service excellence. Each participating accounting firm must pass the eligibility standards before they can move forward to earn the award.

Preparing Your Contact List

To be eligible for the Best of Accounting award for client service excellence, **choose at least 3 consecutive months over the last 12 months**, and provide ClearlyRated with a list of **fifty percent (50%) or a minimum of 500** individual client contacts who were billed for services during that time frame.

EXAMPLE 1: You request a list from your accounts receivable department of clients who were billed in May, June, and July. These are three consecutive months, so your list meets the requirement.

EXAMPLE 2: You compile a list of clients who were billed in February, March, and April. These are three consecutive months, but they provided contact information for fewer than 50% of clients that were billed during this time. However, the contact list that was provided included a total of 550 individual client contacts. This requirement has still been met.



You must choose billed clients from 3 consecutive months.

Response Rate Requirements

Participating accounting firms must receive at least a 20% response rate AND at least 15 responses, or a minimum of 250 responses.

EXAMPLE 1: You provide a list of 35 clients. 17 of those clients complete the survey; that's a 49% response rate. You meet the award eligibility requirement of at least a 20% response rate and at least 15 total responses.

EXAMPLE 2: You provide a list of 172 clients. 31 of those clients complete the survey; that's an 18% response rate. This firm does NOT meet the response rate requirements of at least a 20% response rate, despite having received 15+ responses.

EXAMPLE 3: You provide a list of 1500 clients. 280 clients complete the survey; that's a 19% response rate. This firm meets the award eligibility requirements because they have at least 250 responses despite not having a 20% response rate.



You must have at least 15 responses and a 20% response rate.

How to Use Survey Results to Improve ROI

The ClearlyRated client experience program is powered by a survey platform and reporting dashboard designed to help accounting firms maximize the ROI of their survey program.

CLEARLYRATED DASHBOARD

Your online dashboard of survey responses.

PINPOINT PRACTICE AREA ISSUES

Why is our Consulting satisfaction score so much lower? What's happening here? Look into this.

PINPOINT OFFICE ISSUES

What's happening with Miami? Their satisfaction score is too low.

REWARD TOP PERFORMERS

Andy and Angela are doing a really great job! Recognize in next meeting.

RETAIN AT-RISK ACCOUNTS

Partner needs to look into Gerald's issue.

GET REFERRAL PROSPECTS

Ask for referrals from James and Anna!

GET FRESH TESTIMONIALS

Great testimonial. Get on website and proposal template today.

Plus/Enterprise reporting package shown.

https://dashboard.clearlyrated.com

clearlyrated

Surveys Contacts Manage My Issues

Overview / Best of Accounting

Benchmarks Reports Preview

Q2 Survey

Practice Areas

Practice Area	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

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

Partners

Partner	NPS	Response Rate	Flagged
Andy Bernard	100%	50%	--
Angela Martin	100%	45.5%	--
Dwight Schrote	100%	23.5%	--
Erin Hannon	85.7%	28%	--

Responses

NPS	Respondent	Response	Date	Flagged
7	Gerald Clinton <small>Client City</small>	"It's a great id complicated & already full of "I haven't bee product."		
10	James Ford <small>Partner</small>	"Outstanding service and value." "Excellent service by our partner. She's very on top of things!"	Mar 4, 2015	
10	Anna Truman <small>Owner Records</small>	"Professional, expert, great customer service." "Timely response and availability to meet our needs."	Mar 4, 2015	

Testimonials

Respondent	Response	Date
George Pierce <small>Owner Records</small>	Everyone is always helpful and truthful in their efforts and information. Always walk away or actually get off the phone feeling like the things have been resolved.	Jun 1, 2015
Anna Johnson <small>Owner</small>	"Your firm always provides on budget and accurate services. A trusted advisor and true extension of my team."	

How to Use Responses in Your Business

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Overview / Best of Accounting

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Practice Areas

Search	Overview	NPS	Response Rate	Issues
		NPS	Response Rate	Flagged
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Corp. Tax		100%	47.6%	--
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Miami, FL		33.3%	25%	1

Partners

Search	Overview	NPS	Response Rate	Issues
		NPS	Response Rate	Flagged
Andy Bernard		100%	50%	--
Angela Martin		100%	45.5%	--
Dwight Schutte		73.5%	23.5%	--

Plus/Enterprise reporting package shown.



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How to Use Feedback in Your Marketing

Your online reporting dashboard provides much more than diagnostic information; you'll also glean valuable testimonials and recognize potential business development opportunities when you review candid and timely responses.

CLEARLYRATED DASHBOARD
Your online dashboard of survey responses.

RETAIN AT-RISK ACCOUNTS
Partner needs to look into Gerald's issue.

GET REFERRAL PROSPECTS
Ask for referrals from James and Anna!

GET FRESH TESTIMONIALS
Great testimonial. Get on website and proposal template today.

The screenshot shows the 'Q2 Survey' dashboard with a 'Responses' table and a 'Testimonials' section. The 'Responses' table lists three respondents: Gerald Clinton (NPS 7), James Ford (NPS 10), and Anna Truman (NPS 10). A callout box highlights a negative response from Gerald Clinton: "A major deadline was missed on our last audit engagement. We may have to find a new accounting firm to work with." The 'Testimonials' section shows two positive testimonials, with a callout box highlighting one from Anna Johnson: "Your firm always provides on budget and accurate services. A trusted advisor and true extension of my team."

NPS	Respondent	Response	Date
7	Gerald Clinton <i>Circuit City</i>	"It's a great idea, complicated and already full schedule." "I haven't been a product."	
10	James Ford <i>Pets.com</i>	"Outstanding service and value." "Excellent service by our partner. She's very on top of things!"	Mar 4, 2015
10	Anna Truman <i>Tower Records</i>	"Professional, expert, great customer service." "Timely response and availability to meet our needs."	Mar 4, 2015

Respondent	Response	Date
George Pierce <i>Tower Records</i>	Everyone is always helpful and truthful in their efforts and information. I always walk away or actually get off the phone feeling like the things have been	Jun 1, 2015
Anna Johnson <i>Enron</i>	"Your firm always provides on budget and accurate services. A trusted advisor and true extension of my team."	

Plus/Enterprise reporting package shown.

Star Ratings and Testimonials to Inform Buyers

When you survey clients with ClearlyRated, your firm earns star ratings and testimonials on ClearlyRated.com — making it easier to credibly prove your service quality to prospective buyers. The features on your firm’s profile page will depend on the number of partners at your firm.

The screenshot shows a web browser window displaying a profile on www.clearlyrated.com. The profile is for a company named "Your Company Name" located in "Portland, OR".

- BRAND LOGOS:** Points to the ClearlyRated logo and the company logo placeholder.
- LOCATION:** Points to the address: "Portland, OR".
- CONTACT INFO:** Points to the contact details: "email: info@yourcompany.com", "phone: (503) 977-6295", and "Your Company Name of Portland, OR, 522 SW 5th Avenue Suite 600, Portland OR 97204".
- TESTIMONIALS:** Points to a list of five placeholder testimonials, each dated "DECEMBER 13, 2017".
- AWARD BADGE:** Points to a circular badge that says "BEST Accounting Firm".
- RATINGS:** Points to the "CLIENT RATING" section showing a 4.5 star rating based on 154 ratings, and the "OVERALL CLIENT RATING" section showing a 4.5 star rating based on 5,219 ratings.

Ongoing Program Improvements

We're continually evaluating and updating the feature sets of our survey program in order to more effectively partner with you. For the most up-to-date information on our current offerings, reach out to your ClearlyRated contact.

We also...

- **Offer a variety of different integrations with commonly used applications.** Our integrations allow you to access your survey results in the tools you already use and, after a painless initial setup, automate your survey sends. We currently integrate with the following applications:
 - Salesforce
 - Microsoft Dynamics
- **Support a variety of survey frequencies and touchpoints.** Not every survey program is best served by a single annual check-in, and we are able to support a variety of cadences, including:
 - Monthly
 - Weekly
 - Daily
- **Survey internal employees in addition to external clients.**
- **Create opportunities to do even more with the testimonials we collect on your behalf.** We've developed technology to help you amplify the impact of your most positive feedback, including:
 - Social sharing on LinkedIn and Facebook
 - Star Rating widget for your website or email

Ask Your ClearlyRated Contact for More Information!

ClearlyRated Survey Package Features

When you survey clients with ClearlyRated, your firm earns star ratings and testimonials on ClearlyRated.com - making it easier to credibly prove your service quality to prospective buyers. Pricing for your ClearlyRated survey program will depend on the number of partners at your firm, along with survey frequency and package level.

	Premium	Plus	Enterprise
NPS® Drivers satisfaction survey (up to 8 questions)	✓	✓	✓
Real-time access to survey results	✓	✓	✓
View survey responses with Salesforce or Microsoft Dynamics	✓	✓	✓
Star ratings on ClearlyRated.com <ul style="list-style-type: none"> • Real-time star ratings can also be displayed on firm website and in corporate email signatures 	✓	✓	✓
Access to ClearlyRated Marketing Toolkit <ul style="list-style-type: none"> • Social media tools • Best of Accounting press release template (winners only) 	✓	✓	✓
Get fresh testimonials	✓	✓	✓
Real-time email alerts	✓	✓	✓
Get internal employee Shout Outs	✓	✓	✓
Best of Accounting award logo (winners only)	✓	✓	✓
Issue resolution tracking		✓	✓
Get NPS by partner, industry, practice area, or client company		✓	✓
Additional survey questions (up to 10 total)			✓
API access			✓



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