

ClearlyRated® for B2B Service Providers

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 B2B service providers 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.

The Net Promoter® Methodology

ClearlyRated client surveys use 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



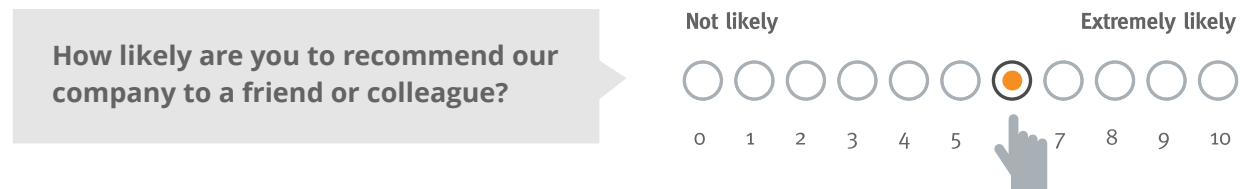
PASSIVES

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

"I speak on behalf of my entire company when I say that we truly love partnering with ClearlyRated. It honestly is one of our most beneficial partnerships. Our biannual survey campaign helps keep us in check on what we need to continue doing and where we can improve and it benefits all teams in our office. AND THE BEST PART, it's SO easy!! I think a big part of this is our Account Manager, Ryen, and her incredible level of service. Seriously, she makes it incredibly easy on me which is so appreciated."



ASHLEY BRICKMAN

Engagement Manager | IDR, Inc.

"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 live is the best!"



KAREN RASHID

Marketing Manager, RP&B CPAs

"The ClearlyRated team is responsive, smart, consultative, and professional. For any company doubting the difference between what ClearlyRated offers and 'do it yourself' survey tools, they just need one interaction with the team to quickly see the value."



ANGELA PERKINS

VP of Sales & Marketing, Xenium

How It Works



Measure client satisfaction with Net Promoter® Score

NPS is a single metric that allows B2B service providers 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 create churn.



Build online reputation with ratings and testimonials

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



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, professional service providers 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.

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]

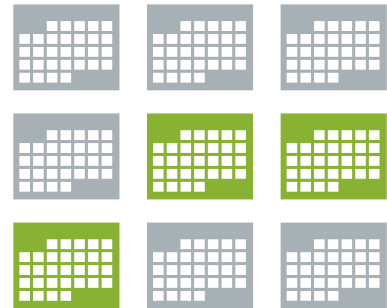
This survey was sent to you by ClearlyRated on behalf of [Brand]. If you have any questions or problems with the survey, please contact ClearlyRated at 800-921-2640, or by email at survey@clearlyrated.com

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

Preparing Your Contact List

Choose at least 3 consecutive months over the last 12 months, and provide ClearlyRated with a list of **one hundred percent (100%) or a minimum of 500** individual client contacts who were billed for services during that time frame.

EXAMPLE: 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.



You must choose billed clients from 3 consecutive months.

Response Rate Requirements

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 B2B service providers maximize the ROI of their survey initiative.

CLEARLYRATED DASHBOARD
Your online dashboard of survey responses.

PINPOINT LOCATION ISSUES
Why is Phoenix's satisfaction score so low? What's happening here?

REWARD TOP PERFORMERS
Dwight is doing a really great job! Recognize in next staff meeting.

GET REFERRAL PROSPECTS
These guys are happy customers. Ask for referrals.

GET FRESH TESTIMONIALS
Great testimonial. Post this on your website ASAP!

https://dashboard.clearlyrated.com

Q2 Survey

Locations

Location	NPS	Response Rate	Flagged
Austin	100%	28.6%	--
Phoenix	16.7%	66.7%	1
Mobile	57%	58.3%	1
San Francisco	60%	33.3%	1
St. Louis	75%	57.1%	--

Account Managers

Account Manager	NPS	Promoters	Passives	Detractors	Average	NPS Impact
Andy Bernard	66.7%	66.7%	33.3%	0%	8.7	+2
Dwight Schrote	100%	100%	0%	0%	9.7	+19

Responses

NPS	Respondent	Response	Date	Flagged	Trend
10	James Bush Studebaker	"Great team to work with - highly professional." "Great team to work with - highly professional."	Sep 9, 2013		
10	George Kennedy Pan Am	"Outstanding service and value." "Professional, expert, great customer service."	Sep 9, 2013		

Testimonials

Respondent	Response	Date
George Lincoln Pan Am	Professional, expert, great customer service.	Sep 12, 2013
Eliza Clinton Tower Records	Everybody 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 resolved.	

Plus/Enterprise reporting package shown.

How to Use Responses in Your Business

The ClearlyRated client experience program is powered by a survey platform and reporting dashboard designed to help B2B service providers maximize the ROI of their survey initiative.

CLEARLYRATED DASHBOARD
Your online dashboard of survey responses.

PINPOINT LOCATION ISSUES
Why is Phoenix's satisfaction score so low? What's happening here?

REWARD TOP PERFORMERS
Dwight is doing a really great job! Recognize in next staff meeting.

https://dashboard.clearlyrated.com

clearlyrated®

Surveys Contacts Manage My Issues

Overview / Q2 Survey

Benchmarks Reports Preview

Q2 Survey

Locations

Search

	NPS	Response Rate	Flagged
Austin	100%	28.6%	--
Phoenix	16.7%	66.7%	1
Mobile	57.1%	58.3%	1
San Francisco	60%	33.3%	1
St. Louis	75%	57.1%	--

10 per page

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Account Managers

Search

	NPS	Promoters	Passives	Detractors	Average	NPS Impact
Andy Bernard	66.7%	66.7%	33.3%	0%	8.7	+2
Dwight Schrote	100%	100%	0%	0%	9.7	+19

Plus/Enterprise reporting package shown.

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.

GET REFERRAL PROSPECTS

These guys are happy customers. Ask for referrals.

GET FRESH TESTIMONIALS

Great testimonial. Post this on your website ASAP!

The screenshot shows the 'Q2 Survey' dashboard with a 'Responses' table and a 'Testimonials' section. The 'Responses' table lists two customers with NPS scores of 10 and positive feedback. The 'Testimonials' section features a quote from George Lincoln.

NPS	Respondent	Response	Date	Flagged	Trend
10	James Bush <i>Studebaker</i>	"Great team to work with - highly professional." "Great team to work with - highly professional."	Sep 9, 2016		
10	George Kennedy <i>Pan Am</i>	"Outstanding service and value." "Professional, expert, great customer service."	Sep 10, 2016		

Respondent	Response	Date
George Lincoln <i>Pan Am</i>	Professional, expert, great customer service.	Sep 12, 2016
Eliza Clinton <i>Tower Records</i>	Everybody 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 resolved.	

Plus/Enterprise reporting package shown.

Star Ratings and Testimonials on ClearlyRated.com

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

The image shows a screenshot of a company profile page on www.clearlyrated.com. The page layout includes a header with the ClearlyRated logo and a search bar. The main content area is divided into several sections:

- Brand Logos:** A section for the company logo, currently showing a placeholder "Your Logo Here".
- Location:** A section for the company name and location, "Your Company Name of PORTLAND, OR".
- Contact Info:** A section with a "VISIT THEIR WEBSITE" button and contact details: email: info@yourcompany.com, phone: (503) 977-6295, and address: 522 SW 5th Avenue Suite 600, Portland OR 97204.
- Testimonials:** A section titled "TESTIMONIALS" with a dropdown menu set to "About this Location" and five placeholder testimonials, each dated "A CLIENT on DECEMBER 13, 2017".
- Ratings:** A section showing "CLIENT RATING" (4.5 for this location based on 154 ratings by Clients) and "TALENT RATING" (5.0 for this location based on 154 ratings by Talent). A separate "COMPANY RATING" section shows an overall rating of 4.5 based on 5,219 ratings.

Callouts from the left side of the image point to these specific sections: "BRAND LOGOS" points to the logo placeholder; "LOCATION" points to the company name and location; "CONTACT INFO" points to the contact details; "TESTIMONIALS" points to the testimonials section; and "RATINGS" points to the company rating section.



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clearlyrated.com/solutions →

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 company 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 client accounts you service, 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 • Press release template 	✓	✓	✓
Get fresh testimonials	✓	✓	✓
Real-time email alerts	✓	✓	✓
Get internal employee Shout Outs	✓	✓	✓
Best of Legal award logo (winners only)	✓	✓	✓
Issue resolution tracking		✓	✓
Get NPS by account manager, industry, practice area, or client company		✓	✓
Additional survey questions (up to 10 total)			✓
API access			✓



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