



# ClearlyRated® for Accounting Firms

Accelerate growth by:

- Measuring the client and internal employee experience.
- Building online reputation.
- Differentiating on service quality.



## Who is ClearlyRated?

Headquartered in the Pacific Northwest, ClearlyRated is a team that believes 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 or internal employee satisfaction survey with an online profile highlighting star ratings and testimonials earned by the company. 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.

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### INDUSTRY PARTNERS

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## The Net Promoter® Methodology

ClearlyRated client and internal employee surveys use the Net Promoter Score (NPS®) methodology. NPS is a simple metric based on the question "How likely are you to recommend our firm 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



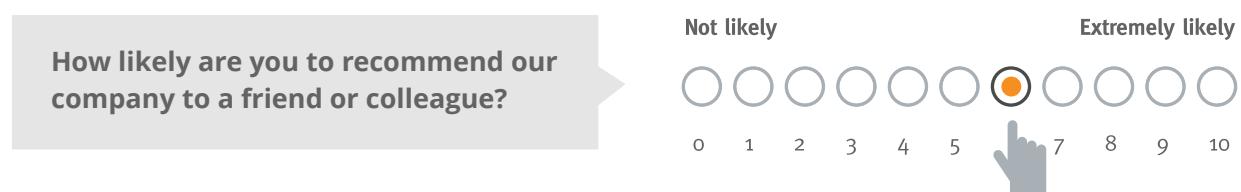
### PASSIVES

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 &amp; Communications, SC&amp;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&amp;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 &amp; Co. | BDO

## How It Works



### Measure client and internal employee satisfaction with Net Promoter® Score

NPS is a single metric that allows accounting firms to measure and grow client and internal employee satisfaction and service quality across the organization.



### 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 and internal employee ratings, which populate real-time on your ClearlyRated.com profile (along with testimonials from clients and internal employees who love you).



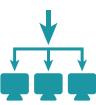
### Win a third-party award for client and internal employee satisfaction

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



### Grow your business on a foundation of service excellence

Surveying your clients and internal employees 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 and internal employee feedback for growth — that's the promise of ClearlyRated.



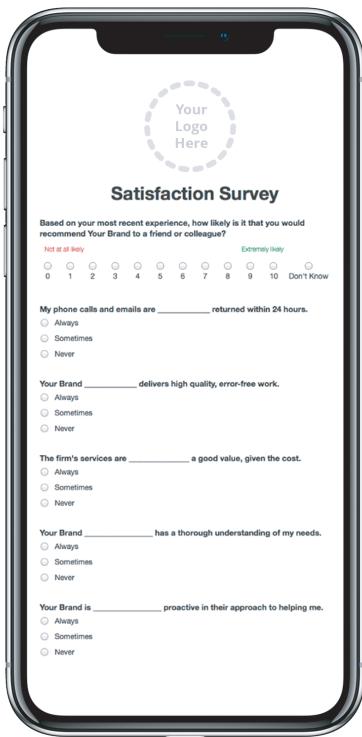
### Offer a variety of different integrations with commonly used applications

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

## 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.

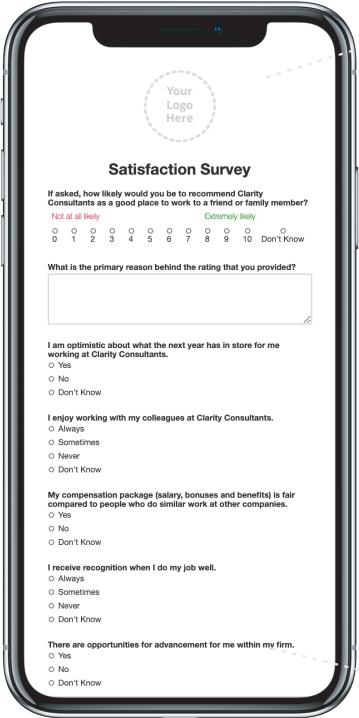
Always  
 Sometimes  
 Never

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?

## 13-Question Employee Survey

This is a preview of the survey your internal employees will receive.





### Satisfaction Survey

If asked, how likely would you be to recommend Clarity Consultants as a good place to work to a friend or family member?

Not at all likely  Extremely likely

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

What is the primary reason behind the rating that you provided?

I am optimistic about what the next year has in store for me working at Clarity Consultants.

Yes  No  Don't Know

I enjoy working with my colleagues at Clarity Consultants.

Always  Sometimes  Never  Don't Know

My compensation package (salary, bonuses and benefits) is fair compared to people who do similar work at other companies.

Yes  No  Don't Know

I receive recognition when I do my job well.

Always  Sometimes  Never  Don't Know

There are opportunities for advancement for me within my firm.

Yes  No  Don't Know

I am proud to work for Clarity Consultants.

Always  Sometimes  Never  Don't Know

I feel like I belong at this firm.

Always  Sometimes  Never  Don't Know

The best people get promoted, regardless of gender, race, ethnicity, age, sexual orientation or identity, education or disability.

Always  Sometimes  Never  Don't Know

Management shows that diversity is important through its actions.

Always  Sometimes  Never  Don't Know

What can Clarity Consultants do to improve your experience as an employee?

Placeholder for text input.

## 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)

For your time, you will be entered into a drawing for a [x]\* 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 either a donation or delivery of your prize 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]

Incentives are optional and managed by your firm. We suggest adding one if possible, it does increase response rate. The incentive can be anything from a VISA gift card, to a donation to a charity, we've even seen clients give away an iPad.

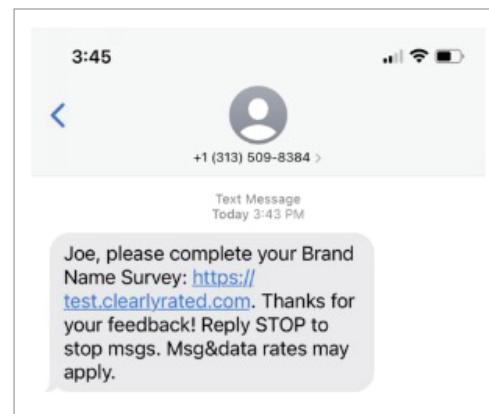
Typically a VISA gift card is between \$100-\$300 and donations are between \$150-\$500.

*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](mailto:survey@clearlyrated.com)*

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

Send surveys by SMS in addition to your email invitation!

(This feature is available at an additional cost.)



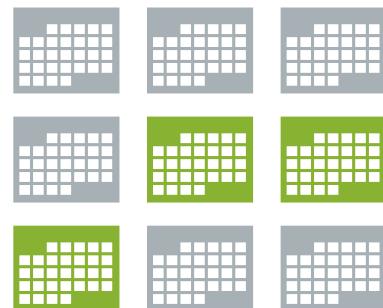
## Who to Survey

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 10% response rate AND at least 15 responses, or a minimum of 100 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 10% response rate and at least 15 total responses.



You must have at least 15 responses and a 10% response rate.

**EXAMPLE 2:** You provide a list of 172 clients. 15 of those clients complete the survey; that's a 9% response rate. This firm does NOT meet the response rate requirements of at least a 10% response rate, despite having received 15 responses.

**EXAMPLE 3:** You provide a list of 1500 clients. 135 clients complete the survey; that's a 9% response rate. This firm meets the award eligibility requirements because they have at least 100 responses despite not having a 10% response rate.

# How to Use Survey Results to Improve ROI

## Leverage Your Survey Results into Business Growth with ClearlyRated's Financial Impact Report

In a single—automatically generated!—email, you have all the information you need to compare the current and future impact of your survey program with the investment you've made into gaining insight into the satisfaction of your clients.

With this information you'll be able to easily identify at-risk accounts and the estimated revenue you could be losing. You'll also be able to quickly identify accounts that LOVE you, from whom you should be requesting referrals. All of that information, and more, in a downloadable report, sent right to your inbox.

## Customized web traffic analytics at your fingertips in your ClearlyRated Dashboard.

### Profile Analytics

Your profile pages on ClearlyRated create activity from prospects, current clients, and employees looking to find out more information on what it is like to work with your company. Use the filter settings below to see the

BRAND: All Brands LOCATION: All Locations DATE: Last Week, Last 4 Weeks, Last 52 Weeks, Prior Year

#### Google Search Visibility

Google Search Result Impressions <small>Total number of times your profiles appeared in a Google search result</small>	920,000	\$9,490 <small>in generated advertising value</small>
Google Search Result Clicks <small>Total number of times your profiles were visited from a Google search result page</small>	2,850	

#### ClearlyRated Visibility

ClearlyRated Search Result Impressions <small>Total number of times your profiles appeared in a search result on ClearlyRated</small>	0	
ClearlyRated Unclaimed Profile Impressions <small>Total number of times your profiles were advertised on unclaimed profiles from your industry</small>	40	
ClearlyRated Best Of Award Winner Impressions <small>Total number of times your profiles were advertised at the top of geography and area of expertise targeted pages as Best Of award winners</small>	40	\$10,342 <small>in generated advertising value</small>
ClearlyRated Profile Clicks <small>Total number of times your profiles were visited from a ClearlyRated search result and targeted pages</small>	4,529	

Using survey responses from your account over the past year, your ClearlyRated survey program has identified the following:

#### Accounts At Risk

**17** **\$237K**

Detractor Accounts

Likely Revenue Loss

**Take Action:** convert 5 of your Detractor accounts to Promoters or Passives to retain \$70K in potential revenue.

Click the numbers above to download a list of the accounts.

#### Accounts To Watch

**0** **\$0**

Former Promoter

Potential Revenue Loss

Congratulations, you have no former Promoter accounts that are now Passives!

Click the numbers above to download a list of the accounts.

#### Accounts To Grow

**163** **\$456K**

Promoter Accounts

Revenue Expansion Opportunities

**Take Action:** Promoters on average increase their spend by 8% in the next year. If you make that happen for only a quarter of your Promoters you could net \$114K in revenue expansion.

Click the numbers above to download a list of the accounts.

#### Profile Activity

**17** **\$57**

Profile Interactions

Advertising Value

Your profiles have generated 158 Impressions of your company in Google search results and on ClearlyRated. This led to 17 interactions with your company (click to call, click to your website, etc) from prospects and current clients.

**Take Action:** Request a ClearlyRated Profile SEO Audit from your Account Manager if you haven't already. Additionally, following all the steps below will increase the likelihood that your profile pages will appear higher in Google searches and therefore create more advertising value for you.

## How to Use Responses in Your Business

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.

**Q2 Survey**

**Practice Areas**

	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**

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

**Partners**

	NPS	Response Rate	Flagged
Andy Bernard	100%	50%	--
Angela Martin	100%	45.5%	--
Dwight Schrute		23.5%	--

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.

**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.

**Sharing your testimonials on social media is easy! Just use the sharing links on your testimonial page.**

**Testimonials**

Respondent	Response	Date
Dwight Schrute <small>Dunder Mifflin, Inc</small>	<p>My account manager has been great! They email me back right away and even helped me put together my emergency preparedness plan!</p> <p><b>Share On:</b> <a href="#">facebook</a> <a href="#">LinkedIn</a></p>	Apr 22, 2020

Share On LinkedIn

**LINKEDIN POST**

Dunder Mifflin client Dwight Schrute shared this great testimonial on April 22, 2020:

"My account manager has been great! They email me back right away and even helped me put together my emergency preparedness plan!"

To read all our testimonials, check out our ClearlyRated profile here: <https://www.clearlyrated.com/b2b-software/or-usa/portland-or/clearlyrated-portland-or/>

**Cancel** **Post to LinkedIn**

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

## 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.

Easily add this widget to your website or email signature. A simple click takes prospective clients and employees to your ClearlyRated profile page.

**BRAND LOGOS**

**LOCATION**

**CONTACT INFO**

**TESTIMONIALS**

**AWARD BADGE**

**RATINGS**

The desktop browser window displays the following content:

- Header:** www.clearlyrated.com, clearlyrated logo, search bar, 'GET YOUR BUSINESS ON CLEARLYRATED' button.
- Profile Section:**
  - Logo:** Your Company Name of PORTLAND, OR
  - Client Rating:** 4.5 based on 154 ratings by Clients.
  - Testimony:** "Cras ac lorem malesuada, pulvinar ex eget, dignissim ex. Donec nec Donec nec. Donec nec ultricies orci. Vivamus dictum libero arcu, id euismod view more..."
- Get in Touch:** 'VISIT THEIR WEBSITE' button, contact info (email: info@yourcompany.com, phone: (503) 977-6295), location note: "This location does NOT accept visitors without an appointment. Please contact Your Company Name before visiting this location.", map link: "View Map".
- Testimonials:** A section showing multiple client reviews with names like "A CLIENT on DECEMBER 13, 2017". Each review includes a short quote and the date it was posted.
- Company Awards:** A badge for "BEST Accounting".
- Company Rating:** Overall rating for 5 locations: 4.5 based on 5,219 ratings.
- Company Headquarters:** Address: 522 SW 5th Avenue Suite 600, Portland OR 97204, map link: "View Map". Note: "This location does NOT accept visitors without an appointment. Please contact Your Company Name before visiting this location.", contact info: email: info@yourcompany.com, phone: (503) 977-6295.

## Engagement + Retention

Set yourself up for success by engaging with your clients at different points on their journey. By measuring satisfaction throughout the year, you'll identify issues earlier — allowing you to resolve them quicker and celebrate wins faster. All with the goal of retaining and growing client partnerships.

### Customized Frequency Options

Pick the frequency that works best for you — we'll provide best practices, and more, along the way! We support the following cadences and can customize to your unique needs:

- Monthly
- Weekly
- Daily



### Client Engagement Program

With built in suppression rules, you can be explicit about how often your clients receive a survey request. Simply pull all the clients you billed the previous week or month, and we'll do the rest!



**Ask Your ClearlyRated Contact for More Information!**

## Don't miss this opportunity to be recognized as a pioneer in our industry!

The engagement and happiness of clients is paramount to your success as an organization. But who is responsible for supporting your clients? Who offers your key contacts exceptional levels of service to keep them coming back, and who inspires them to share their positive experience with their networks?

Your employees, of course. And their happiness and job satisfaction matters too.



Demonstrating a commitment to diversity, equity, and inclusion (DEI) in the workplace is no longer optional. 70% of job seekers say that, when evaluating potential employers, they value a company's commitment to diversity.

That's why ClearlyRated has launched a new addition to our offerings: a survey specifically designed to measure and improve employee satisfaction within your organization!

### Preparing Your Internal Employee Contact List

To be eligible for the award, each accounting firm must send the survey to all current US and Canada based full-time permanent internal employees.

### Response Rate Requirements

Participating accounting firms must receive at least ten (10) completed responses and must receive a minimum response rate of fifty percent (50%) to the Survey. If the Brand receives at least 250 responses, the Brand does not have to receive a fifty percent (50%) response rate to be eligible.



You must have at least 10 responses and a 50% response rate.

## 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.

<b>NPS® Drivers satisfaction survey (up to 8 questions)</b>	✓
<b>Number of brands able to survey</b>	2*
<b>Real-time access to survey results</b>	✓
<b>View survey responses with Bullhorn ATS, Salesforce, or Microsoft Dynamics</b>	✓
<b>Star ratings on ClearlyRated.com</b> <ul style="list-style-type: none"> <li>Real-time star ratings can also be displayed on firm website and in corporate email signatures</li> </ul>	✓
<b>Access to ClearlyRated Marketing Toolkit</b> <ul style="list-style-type: none"> <li>Social media tools</li> <li>Best of Accounting press release template (winners only)</li> </ul>	✓
<b>Get fresh testimonials</b>	✓
<b>Real-time email alerts</b>	✓
<b>Get internal employee Shout Outs</b>	✓
<b>Best of Accounting award logo (winners only)</b>	✓
<b>Issue resolution tracking</b>	**
<b>Get NPS by account manager, industry, practice area, or client company</b>	**
<b>Additional survey questions (up to 10 total)</b>	**
<b>API access</b>	**

\* Additional brands available at incremental cost.

\*\* Available product enhancement.



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