

## 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 less 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.