



Best of Accounting® 2021: Maximizing value and a sneak peek at *NEW* features

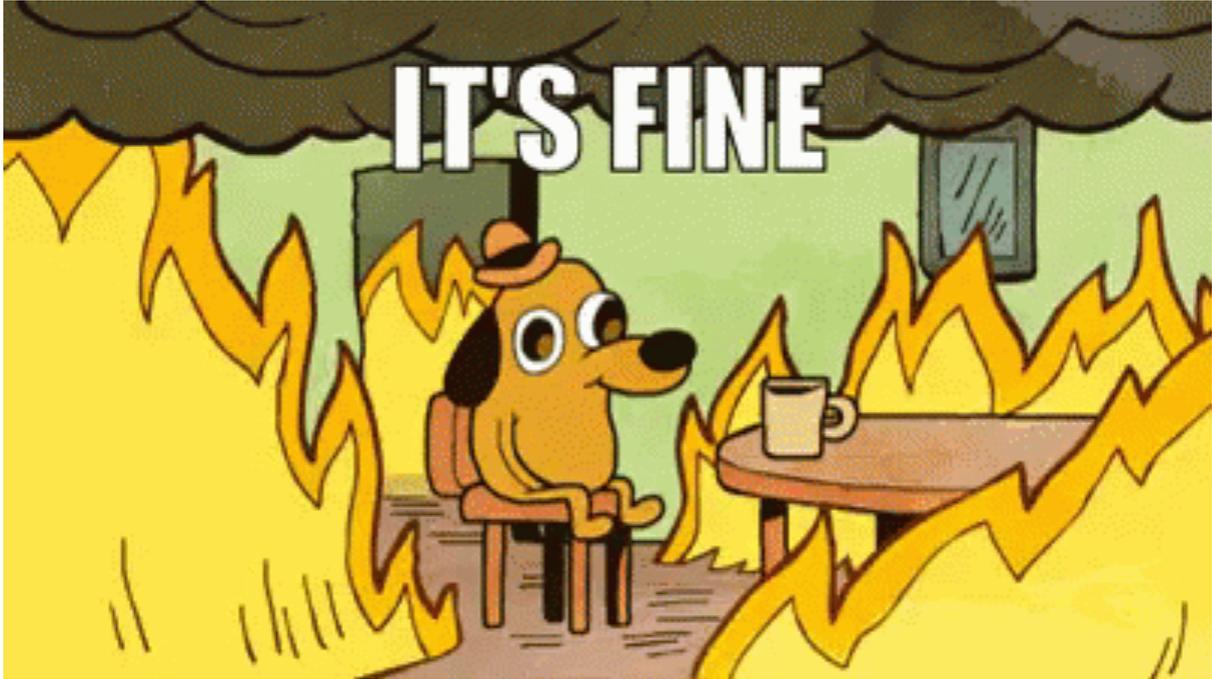
Presented by:

Eric Gregg, CEO & Founder

Bridget Harper, VP of Customer Success



2020 in a nutshell...



Today's Agenda

1. Overview of current state of accounting industry.
2. Share latest research on impact of service on accounting bottom line.
3. Outline ClearlyRated tools available to help you now and *NEW* features for 2021.



Best of Accounting participants stand out against the industry



=

FEWER THAN

2%

of all accounting firms earned the award in 2020

TESTIMONIALS

7.2k

For firms from clients for outstanding service

SHOUT OUTS

5.2k

from clients for outstanding individual service providers

Where the Industry is Today

And what's in store for
the next 6 months



WHO KNOWS?

The industry outlook is cautiously optimistic

Strategic Focus

Cutting
Costs
56%

▼-18



Investing
for Growth
44%

▲+18

Retention

Retaining Existing Clients

56%

▲+2

Expansion

Expanding Existing Accounts

11%

▼-9

Attraction

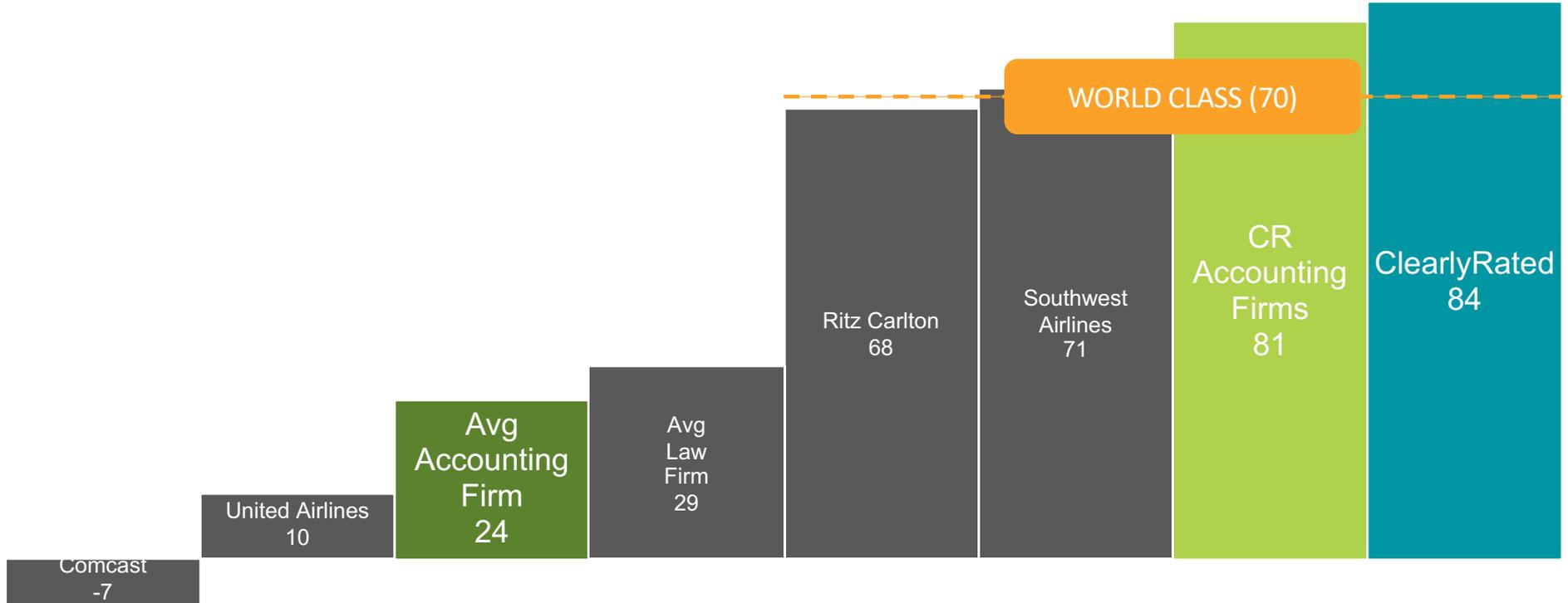
Attracting New Clients

33%

▲+7

SOURCE: ClearlyRated Business Outlook Index

NPS in accounting – service level in context



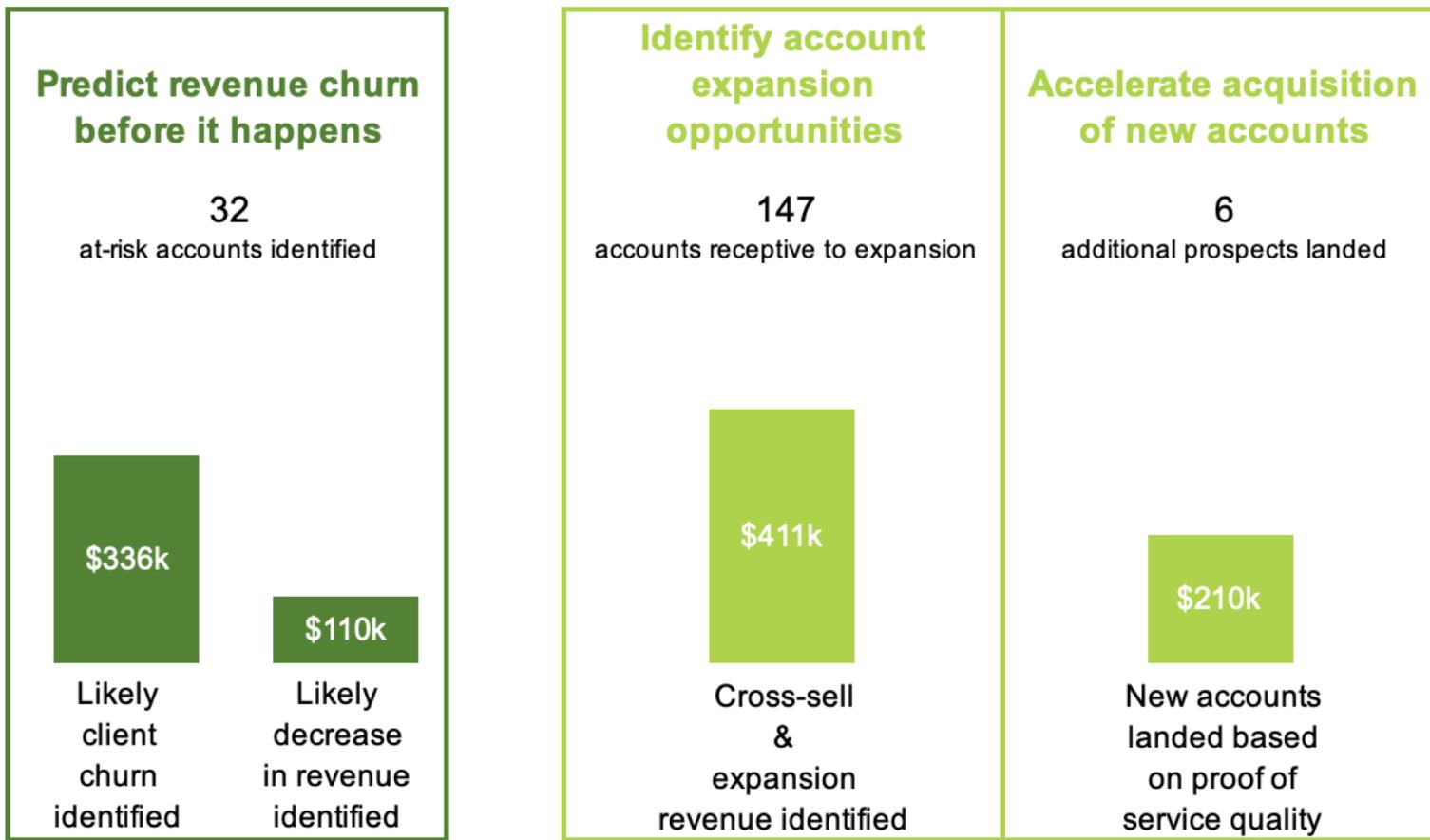
Measure the client and employee experience.
Build online reputation.
Differentiate on service quality.



The ROI of Service Excellence

How to protect and grow revenue during an economic downturn

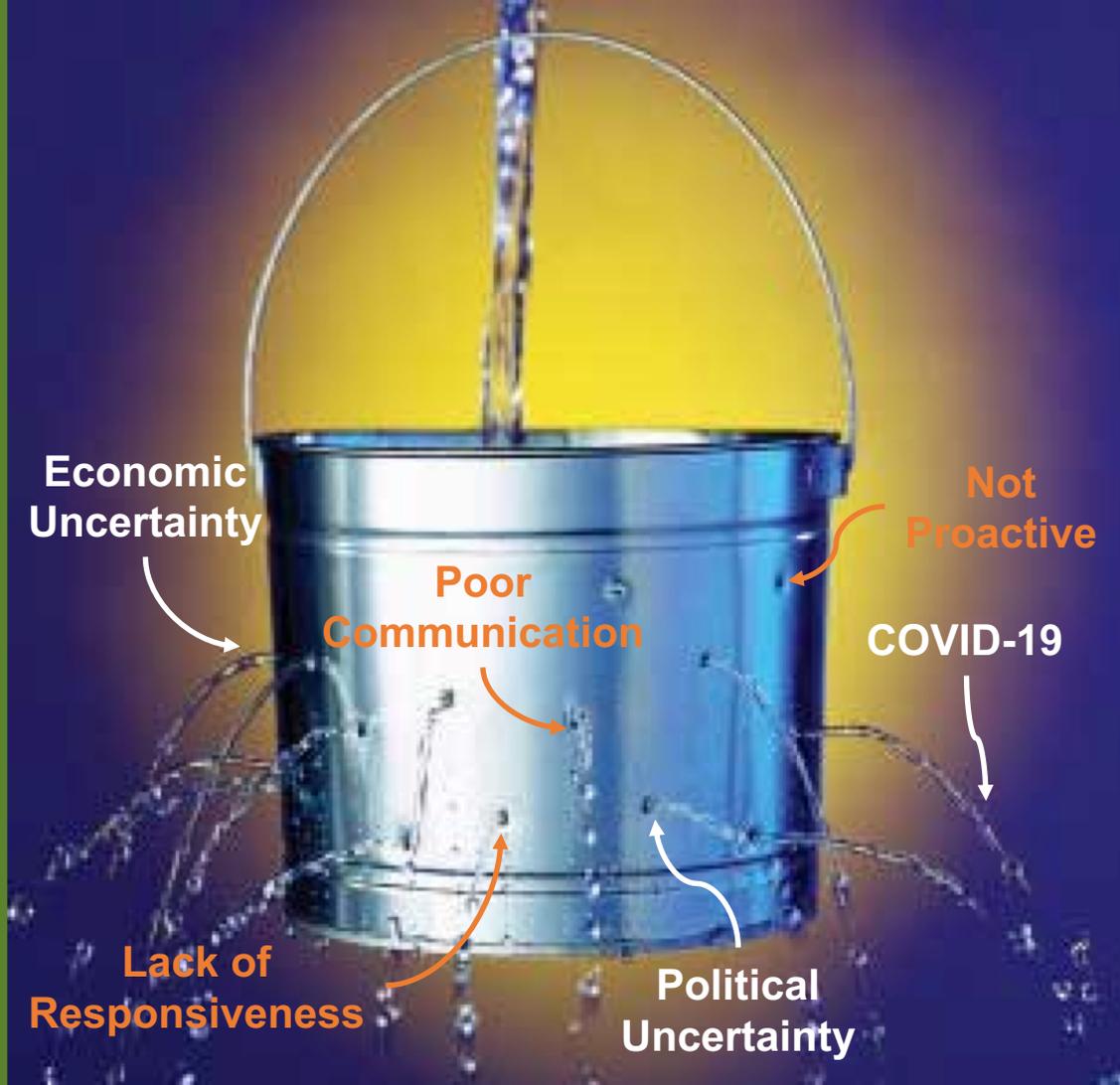
Client Satisfaction: A \$1.1M* Opportunity at A \$20M Accounting Firm



*Based on results from existing ClearlyRated accounting firm clients, assuming \$20M in annual sales, and \$34,965 annual revenue per client.

The Leaky Bucket Metaphor

Don't set back growth
with preventable churn



Protecting revenue: Lessons from 2009 and beyond

What we learned in 2009

1. Client NPS went up.
2. Clients use the economy to push for concessions.
3. Buyers become more risk averse in their decisions.
4. Changes in NPS lead changes in financials by 6-12 months.

What (we think) is different in 2020

1. There is even greater uncertainty.
2. Reputation even more important when you can't "be in the room".
3. Social proof more expected as means of differentiation.
4. Build (and show) expertise.
5. Brand trust is critical to success with clients and internal employees.

Get real-time feedback in front of Partners and Staff



The screenshot shows a Salesforce lead record for "Abe Lincoln". The lead is associated with "Whitehouse Inc." and has a phone number of "(610) 265-9100" and an email of "abe@us.gov". The lead is currently in the "Working - Contacted" stage. Below the lead details, there is an activity section with a "ClearlyRated" entry. This entry shows a response from Abe Lincoln, CEO of Whitehouse Inc., received on Nov 27, 2019. The response status is "No Issues". The response includes contact information for Abe Lincoln and details about the ClearRated account manager, salesperson, and industry.

Received	Contact Information	Brand
Nov 27, 2019	Abe Lincoln CEO Whitehouse Inc. abe@us.gov (Phone)1-800-323-5512	ClearlyRated
Status		Account Manager
No Issues		Ryen Salo
		Salesperson
		Eric Gregg
		Industry
		Government



Get real-time feedback in front of Partners and Staff



The screenshot displays the Microsoft Dynamics 365 interface for a contact named Cathan Cook. The left-hand navigation pane includes sections for Home, My Work, Auto capture (preview), Customers, Sales, and Collateral. The main content area is titled "Cathan Cook's Response" and is divided into three sections: Respondent Info, Response History, and Feedback.

Respondent Info

NPS	Survey	Completed
10	March 2020 - Client	Mar 27, 2020

50 per page | < Prev 1 - 1 of 1 Next >

Feedback

NPS Question	Based on your most recent experience, how likely is it that you would recommend ClearlyRated to a friend or colleague?	0 1 2 3 4 5 6 7 8 9 10 Don't Know
Comment Open-End	What is the primary reason behind the rating you provided?	No Response
At-Risk Clients	Have you identified any at-risk clients based on the survey feedback you've received?	Yes No Don't Know
Differentiate	Has your ClearlyRated survey program helped you differentiate yourself from competitors?	Yes No Don't Know
ROI	Has your ClearlyRated survey program provided a positive ROI, given the cost?	Yes No Don't Know

#AM2DM

Best of Accounting

Maximizing the value
you already have



93.2% of ClearlyRated's accounting clients
say their program helps differentiate them

ClearlyRated + Best of Accounting 7 Years Strong



8 months

Miley Cyrus and Liam Hemsworth



6 years

Katie Holmes and Jamie Foxx



8 years

Adele and some guy who
never really deserved Adele

ClearlyRated is helping spread the #goodnews for you

ClearlyRated
1,091 followers
1w • 🌐

We're thrilled to be able to celebrate this [#goodnews](#) from [SME CPAs](#). All of our focus on [#serviceexcellence](#) turns into something tangible when we look at how our business relationships help us navigate some of the most tumultu ...see more

SME CPAs [#goodnews](#) from clearlyrated

“*Tommy is always available to help me with accounting/financial advice, and most recently helped by rapidly equipping me with all of the information needed for my PPP loan application during a crucial time for us. He has been a reliable ally since starting my business, and I greatly appreciate his help through the years and now.*”

– Shout out from SME CPA's client
05/07/2020

SME CPAs | ClearlyRated
clearlyrated.com • 1 min read

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1,057 followers
2w • 🌐

We're already proud to partner with our [#bestofaccounting](#) winners, but the gratitude that Alloy Silverstein's client feels for their caring and compassionate service just sweetens the deal. Great job, [Alloy Silverstein](#)! Thank you for upholding your commitment to [#serviceexcellence](#), and congratulations on the [#goodnews](#)!

Alloy Silverstein

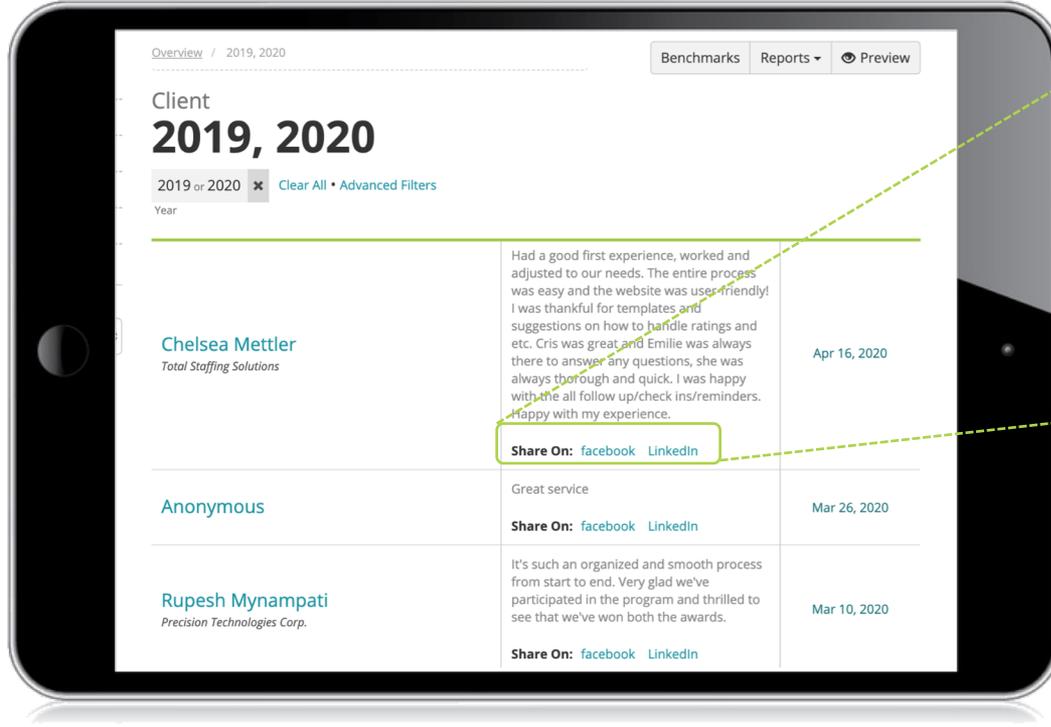
“*As my company accountant and my financial adviser, I can only say this is what providing a service should be. Caring compassionate professionals looking out for your wellbeing 365 days a year. Thank you, thank You, thank you!*”

– Testimonial from Alloy Silverstein's client
06/02/2020

[#goodnews](#) from clearlyrated

Alloy Silverstein - Best of Accounting Winner
cvsoci.al • 1 min read

Take actions on testimonials on Facebook and LinkedIn



**POST
TESTIMONIALS
DIRECTLY TO
FACEBOOK AND
LINKEDIN**



#goodnews

Take actions on past testimonials on Facebook and LinkedIn

Respondent	Response	Date
John Gross <i>BST</i>	Emilie Cleemis is very reachable and responsive to our needs. We are preparing to send two surveys in the next 10 days and she was helpful with the process. Share On: facebook LinkedIn NEW FEATURE	Jun 17, 2020
Mike McBrierty <i>Elassen Group</i>	Consistent high quality service and continued enhancements and updates. Everyone on the team has been great to work with. Love the dashboard and all of the data provided. Share On: facebook LinkedIn	May 28, 2020
Shannon Ronspies <i>Staffmark Group</i>	Great Customer Service Share On: facebook LinkedIn	May 21, 2020
Matt Nagler <i>BANKW Staffing, LLC.</i>	You guys are the best! Share On: facebook LinkedIn	May 20, 2020
Laura Cataldo	Great customer service by Zita. Always responds to any requests or questions I may have, I know I	

Eric Gregg
June 19 at 10:04 AM · ClearlyRated · 🧑

Are things normal? Definitely not... but they are getting busier. Great work by Emilie. Way to keep the service levels high **Bridget Harper** and the rest of the **ClearlyRated** team!

"Emilie Cleemis is very reachable and responsive to our needs. We are preparing to send two surveys in the next 10 days and she was helpful with the process."

clearlyrated
CLEARLYRATED.COM
ClearlyRated | ClearlyRated
ClearlyRated of Portland, OR has 403 verified ratings from their clients earning them 4.9 out of 5 stars!

**POST TESTIMONIALS
DIRECTLY TO FACEBOOK
AND LINKEDIN**



#goodnews

Share the love with staff by posting shout-outs to LinkedIn

Respondent	Shouting Out	Shout Out
Christine Strukel <i>Maner Costerisan</i>	Zita Flaherty	She made the onboarding and transportation easy and almost gun. Thanks for the reminders too. Share On: LinkedIn NEW FEATURE
Mike McBrierty <i>Eliassen Group</i>	Zita Flaherty	Zita has done an amazing job in helping us integrate a newly acquired firm into our survey program. Always a pleasure to work with and a valued partner for us. Keep up the great work and thanks for all that you do. Share On: LinkedIn
Shannon Ronspies <i>Staffmark Group</i>	Lauren Petersen	Lauren has given exceptional service getting Wendy and myself up to speed on ClearlyRated and NPS processes for Staffmark Group! I appreciate all she does for us! Thank you! Share On: LinkedIn
Matt Nagler <i>BANKW Staffing, LLC.</i>	Ryen Salo	She just awesome and is a great account manager. Share On: LinkedIn

Eric Gregg
CEO & Founder at ClearlyRated
2d • Edited • 🌐

Working remotely means leaders need to trust their teams even more than usual. That's easy to do when clients say things like this. [ClearlyRated](#) client [Mike](#) gave [Zita Flaherty](#) this amazing shout out on May 28: "Zita has done an amazing job in helping us integrate a newly acquired firm into our survey program. Always a pleasure to work with and a valued partner for us. Keep up the great work and thanks for all that you do."

To see our ratings and testimonials, check out our ClearlyRated profile here: <https://lnkd.in/g-k4YtC>

👍 7

Reactions

Like Comment Share Send

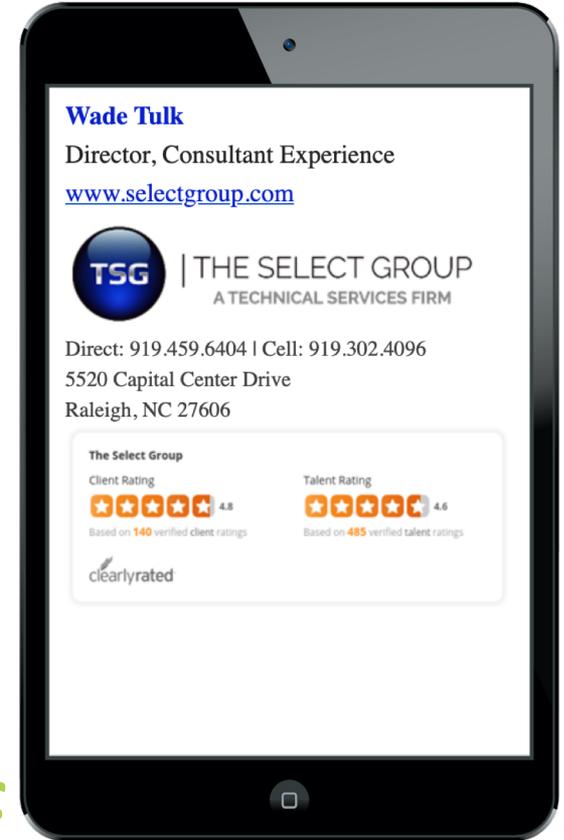
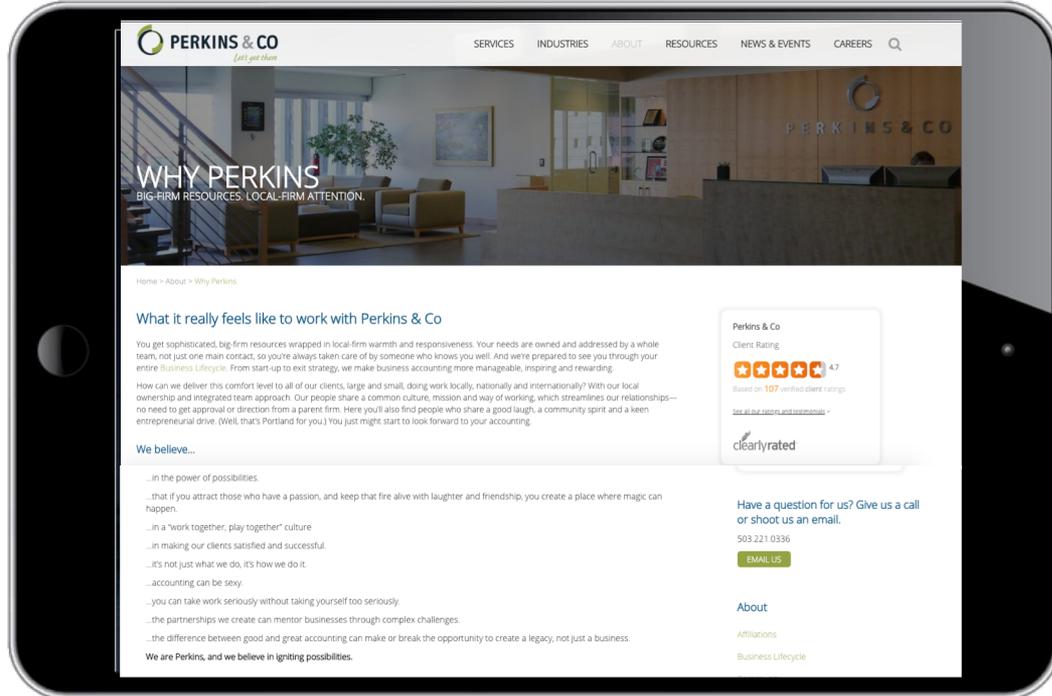
📈 709 views of your post in the feed

**POST SHOUT-OUTS
DIRECTLY TO LINKEDIN**



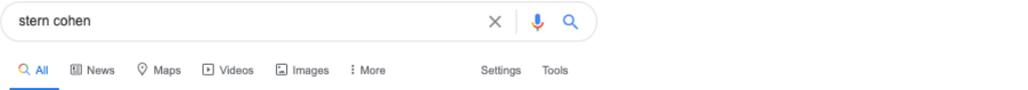
#goodnews

Use your service as a differentiator with star ratings widgets



#socialproof

Bolster your SEO and online reputation



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Stern Cohen - Best of Accounting Winner | ClearlyRated

Stern Cohen is a accounting firm that specializes in: Audit / Assurance, Business Tax, and Consulting. About Stern Cohen. Stern Cohen is in the Accounting ...

How do clients rate Stern Cohen?

What kind of company is Stern Cohen?

★★★★★ Rating: 4.8 - 127 votes

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Stern Cohen LLP | LinkedIn

Stern Cohen LLP | 927 followers on LinkedIn | We're a full-service, award-winning accounting, tax & bookkeeping firm serving clients in Toronto, Canada, and ...

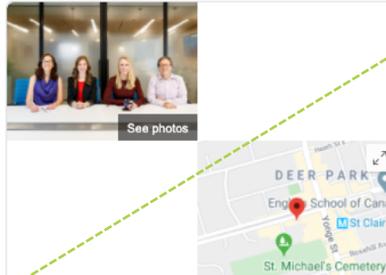
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Stern Cohen Accountants

Website Directions Save

4.7 ★★★★★ 15 Google reviews

Accountant in Toronto, Ontario

Located in: **Yonge**

Address: 45 St Clair Ave W 14th Floor, Toronto, ON M4V 1L3, Canada

Hours: **Closed** · Opens 8:30AM Wed

Phone: +1 416-967-5100

⚠ Hours or services may differ

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Questions & answers

Be the first to ask a question

Ask a question

Reviews from the web

4.8/5 ClearlyRated · 127 votes

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Stern Cohen - Best of Accounting Winner | ClearlyRated

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How do clients rate Stern Cohen?

What kind of company is Stern Cohen?

★★★★★ Rating: 4.8 - 127 votes

Reviews from the web

4.8/5 ClearlyRated · 127 votes

#socialproof

Differentiate and Acquire

Service transparency is your key to trust and growth post-COVID



The average
accounting firm has
4
online customer reviews




accounts
average
448
online
customer
reviews

ClearlyRated provides your
prospective clients social proof of
service quality on
ClearlyRated.com

Bolster your SEO and online reputation

5 steps to take today to improve your Google Search Rank

1. Ensure all your contact information is updated for your profile pages (address, phone, email, etc.)
2. Share ratings by location.
3. Customize your page.
4. Link back.
5. Keep your profile page reviews updated.

Bonus: Request an SEO Audit from us!

Best of Accounting 2021

NEW Employee Survey Option



Introducing Best of Accounting - Employee



**EMPLOYEE SURVEY
INCLUDED AT NO
ADDITIONAL COST
FOR 2020**

Why you should participate in Best of Accounting - Employee

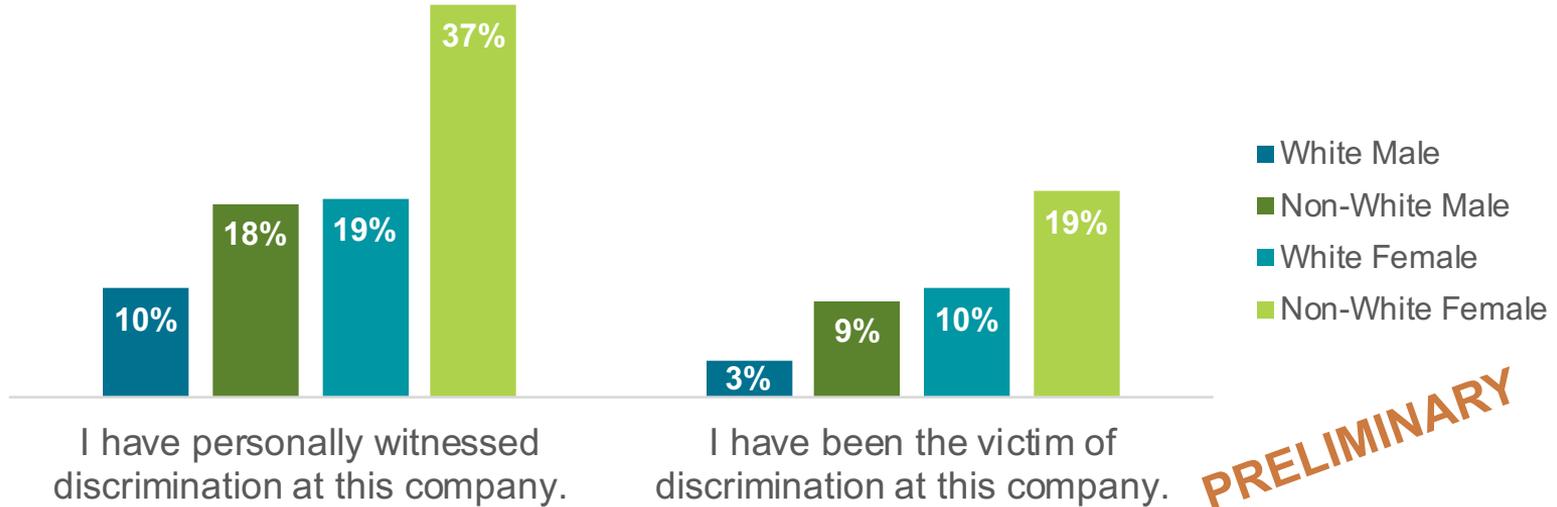
Why your firm should participate

1. A **FREE** basic survey for 2020.
2. Anxiety is high.
3. This is a loyalty 'moment of truth'.
4. Disruptions to internal staff will effect your recovery.
5. Client satisfaction impacted by satisfaction of internal staff.

How Best of Accounting employee survey is different

1. Simple for employees (<20 questions).
2. Testimonials and shout-outs automated to help with recruiting.
3. Diversity, equity & inclusion (DEI) questions built in, along with key DEI demographics.
4. Ability to benchmark DEI vs. other firms (*PAID version only*)
5. Within Best of Accounting program.

Why the survey will provide a focus on DEI



SOURCE: CareerBuilder, ASA & ClearlyRated 2020

Questions?



ERIC GREGG

CEO & Founder, ClearlyRated

egregg@clearlyrated.com

[linkedin.com/in/ericgregg](https://www.linkedin.com/in/ericgregg)



BRIDGET HARPER

VP of Customer Success

bridget.harper@clearlyrated.com

[linkedin.com/in/bridgetharper](https://www.linkedin.com/in/bridgetharper)



CLIENT RATING



4.9 for this location based on
341 ratings by clients