

ClearlyRated®

Getting Started Package



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Preparing Your Contact List for the Survey

Included in this Getting Started Packet is a blank contact list (CSV file) along with instructions on how to properly fill out each column in order for it to upload smoothly into our system (PDF document titled “Contact List Template”). The PDF tells you which information belongs in each column and includes three examples. The CSV is the blank template you’ll use to populate your contact list.

ACCESSING YOUR FEEDBACK

You will receive information regarding your ClearlyRated dashboard login. If you already have a login to the ClearlyRated dashboard but forgot your password you can reset it by clicking the “[I forgot my password!](#)” button on the [ClearlyRated dashboard login page](#).

ASSEMBLING YOUR SURVEY CONTACT LIST

Create a survey contact list with your clients’ contact information and data segmentation (if applicable to your package), and upload to the ClearlyRated dashboard.

Don’t Forget!

Important Action Items



ON DEMAND WELCOME WEBINAR

Our welcome webinar will take you through the steps of how to compile your survey contact list, upload it to your ClearlyRated dashboard as well as survey best practices.



Log into your dashboard to view your key survey dates. Use [this guide](#) to navigate you to your survey schedule.



COMPILE YOUR CLIENT SURVEY CONTACT LIST AND UPLOAD TO THE CLEARLYRATED DASHBOARD USING THIS [CHECKLIST](#)

Who to Survey

Surveying your clients with ClearlyRated grants your firm eligibility to win the annual best of award for client satisfaction. Each participating firm must pass the eligibility standards before they can move forward to earn the award.

PREPARING YOUR CONTACT LIST

To be eligible for the award, each participating brand must send the survey to one hundred (100%) or a minimum of 500 individual client contacts who were billed during three (3) or more consecutive months over the previous 12 with no individual client contacts removed with the specific intent to receive a higher Net Promoter Score.

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



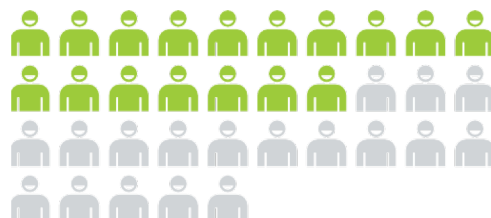
YOU MUST CHOOSE BILLED CLIENTS FROM 3 OR MORE CONSECUTIVE MONTHS.

RESPONSE RATE REQUIREMENTS

Participating firms must receive at least a 15 completed responses AND must receive a minimum response rate of 20%. If the participating brand received at least 250 responses, the participating brand does not have to receive a 20% response rate to be eligible.

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 response.

Example 2: You provide a list of 1500 employees. 280 employees 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.

Initial Email Invitation Sent to Clients

From: [Your Brand Name]
Subject: [Your Brand Name] – 8 Question Survey

Dear [client's first name],

Your opinion is important to us. Please help us improve by completing a quick, eight 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 [Your Brand Name]. 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 and Official Drawing Rules. To unsubscribe from all future surveys conducted by ClearlyRated, please click here: [unsubscribe link](#)

8-Question Client Survey

This is the survey that will be sent to your clients.

SURVEY QUESTIONS

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

(Scaled 0 - 10 answer option)

Have any issues you've had been resolved within 24 hours?

- ☐ Yes
- ☐ No
- ☐ N/A

Does [brand] submit multiple qualified candidates that match your requirements?

- ☐ Yes
- ☐ No
- ☐ N/A

Does [brand] submit candidates who would be a good culture fit for your team?

- ☐ Yes
- ☐ No
- ☐ N/A

Does [brand] submit candidates within the expected time frame?

- ☐ Yes
- ☐ No
- ☐ N/A

Does [brand] set realistic expectations regarding the open positions you have them work on?


- ☐ Yes
- ☐ No
- ☐ N/A

What is the primary reason behind the ratings you provided?

(Open-ended text answer option)

What, if anything, could [brand] do differently to increase the value you receive from them?

(Open-ended text answer option)



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

Have any issues you've had been resolved within 24 hours?

☐ Yes
☐ No
☐ N/A

Does (Your Brand) submit multiple qualified candidates that match your requirements?

☐ Yes
☐ No
☐ N/A

Does (Your Brand) submit candidates who would be a good culture fit for your team?

☐ Yes
☐ No
☐ N/A

Does (Your Brand) submit candidates within the expected timeframe?

☐ Yes
☐ No
☐ N/A

Does (Your Brand) set realistic expectations regarding the open positions you have them work on?

☐ Yes
☐ No
☐ N/A

What is the primary reasons behind the rating you provided?

What is one thing we could be doing differently to increase the value of our services to you?

Email and Mobile Friendly!

Client Testimonials & Shout Outs

All ClearlyRated surveys include a feature to quickly capture Testimonials and Shout Outs for your company. Testimonials and Shout Outs are excellent tools for driving your sales and marketing initiatives and to celebrate your employees.

Testimonial Capture Question:

We're thrilled you had such a positive experience. May we use your feedback as a testimonial?

☐ No, keep my feedback private

☐ Yes, but without my name and company

☐ Yes, including my name and company

Submit

Survey Powered By
clearlyrated

If you have a problem with the survey you can contact [ClearlyRated](#) for help.

How to get the most out of your client testimonials?

If a client gives your company an NPS rating of a 9 or a 10, they will be asked if they would like to leave a testimonial about their experience with your company. The client will have the option to decide if they want their testimonial to remain anonymous or to include their name and company. These testimonials will display on your ClearlyRated profile page(s) if you have testimonials enabled.

Shout Out Capture Question:

Thank You!

Has an employee of ClearlyRated gone above and beyond for you?

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If you have a problem with the survey you can contact [ClearlyRated](#) for help.

How will positive feedback be celebrated in your company?

It's exciting when you receive high scores and positive comments from your clients. Each client will be asked if they'd like to recognize an employee who has gone above and beyond. These are called Shout Outs and it's a great idea to celebrate these recognitions with your internal teams.

Competition Rules & Guidelines

We ask that participants follow a few very important rules and guidelines to ensure a fair competition for everyone involved.

To avoid disqualification, please review the truncated rules below and communicate them to all of your internal employees that will be involved in the competition.

1. REGARDLESS OF INTENT, TAKING SURVEYS ON BEHALF OF YOUR CLIENTS MAY DISQUALIFY YOUR FIRM.

This includes filling out survey answers for your clients over the phone, through email or in person, even if they give you permission to do so.

2. REGARDLESS OF INTENT, INCLUDING INTERNAL EMPLOYEES IN YOUR LIST OF CONTACTS TO BE SURVEYED MAY DISQUALIFY YOUR FIRM.

If you are surveying clients who are also internal employees within your firm, please contact us.

3. REGARDLESS OF INTENT, COMMUNICATING TO YOUR CLIENTS THAT YOU ARE IN A COMPETITION AND NEED TO WIN MAY DISQUALIFY YOUR FIRM.

It is important that you only communicate that you are surveying your clients in order to gauge their satisfaction with your firm and never to mention that you are taking part in a competition, which could unfairly skew responses.

4. REGARDLESS OF INTENT, REMOVING SPECIFIC CLIENTS FROM THE SURVEY THAT YOU FEAR MAY GIVE YOU A BAD SCORE MAY DISQUALIFY YOUR FIRM.

All participants must survey at least fifty percent (50%) or a minimum of 500 individual client contacts who were billed for services during three (3) or more consecutive months.

5. REGARDLESS OF INTENT, UTILIZING THE AWARD LOGO WITHOUT PERMISSION MAY DISQUALIFY YOUR FIRM.

Firms who have purchased the Premium, Plus, or Enterprise package AND are winners listed on clearlyrated.com have rights to use the logo.

6. REGARDLESS OF INTENT, SURVEYS COMPLETED ON A COMPUTER THAT IS OWNED OR UNDER THE CONTROL OF YOUR COMPANY MAY DISQUALIFY YOUR FIRM.

Important Considerations to Ensure a Successful Survey Program

WHO WILL BE THE SENIOR LEADERSHIP INTERNAL CHAMPION?

We recommend having a senior leader on board with this program who has the authority to make changes based on your survey feedback.

WHO ON YOUR TEAM WILL OWN THE PROGRAM TACTICALLY?

One person internally should be assigned the tactical elements of this survey. Compiling the contact list can be cumbersome. This key person will either a.) generate this list, or b.) work with your IT team to generate the list of contacts that will be surveyed.

WHO WILL YOU SURVEY?

Typically the decision of which business to partner with is made by a group of people rather than a single individual. To retain and grow client relationships it's crucial to understand the needs of each individual person within an account. It's a good idea to survey decision-makers and also influencers for feedback.

HOW SHOULD THE REPORTS AND RESPONSES BE SEGMENTED?

If you are participating at the Plus or Enterprise level and are segmenting your data (i.e. segmenting by Location), how your data will be segmented should be decided prior to generating your contact list, and your segments should be reflected in your contact list as outlined in the spreadsheet template included in this package.

WHO WITHIN YOUR COMPANY WILL SIGN THE SURVEY EMAIL INVITATION?

To achieve a strong response rate, it's important that the email invitation sent to your survey recipients be signed by an employee at your company - particularly one who the recipient is familiar with. This aspect gives the invitation a personalized look and feel.

WHO WILL HAVE ACCESS TO THE CLEARLYRATED DASHBOARD AND WHAT LEVEL OF INFORMATION SHOULD THEY BE ABLE TO SEE?

Prior to your survey launching, you will be asked to decide who on your team will have access to the ClearlyRated dashboard and the amount of information they should be able to view. With the Premium package, you receive two (2) logins to the survey dashboard. The Plus package includes five (5) logins and Enterprise package includes ten (10) logins.

Important Considerations to Ensure a Successful Survey Program

WHO WILL FOLLOW THROUGH WITH NON-RESPONDERS TO IMPROVE RESPONSE RATE?

Once your survey has been sent, if you are a Premium, Plus or Enterprise level participant, you will be able to access data about who hasn't taken your survey. This information will be available in real-time in the ClearlyRated dashboard under Reports on the upper right side of your screen. [Click here](#) for a sample script to help guide your team members while reaching out to non-responders.

WHO ON YOUR TEAM WILL RESPOND TO DETRACTORS AND MANAGE ISSUE RESOLUTIONS?

When a client gives you an NPS rating of 6 or lower, they are considered a detractor. If you are a Premium, Plus, or Enterprise level participant, prior to the survey launching, you will want to decide who is responsible for responding to detractors. [Click this link](#) for a white paper titled 'Handling Detractors', this will guide you through best practices when responding to your survey recipients. Additionally within the ClearlyRated dashboard, that same team will also manage those detractors issues within the My Issues section of the ClearlyRated dashboard.

HOW WILL POSITIVE FEEDBACK BE CELEBRATED IN YOUR COMPANY?

It's exciting when you receive high scores and positive comments from your clients. It's a great idea to consider celebrating with your employees who are recognized for providing an exceptional experience! If you are a Premium, or Enterprise level participant, you will receive Shout Out emails where promoters have identified an individual within your organization that has gone above and beyond.

HOW WILL FEEDBACK BE EVALUATED AND CHANGES IMPLEMENTED WITHIN YOUR COMPANY?

Identify the project team who will be evaluating the feedback and prioritizing next steps to implement any changes within your company. The project team should include a senior leader who has authority to drive change.

HOW AND WHEN WILL YOUR SURVEY RESULTS BE COMMUNICATED EXTERNALLY AND INTERNALLY?

We recommend having a plan in place, prior to the survey launching, for communicating your results. In order for your program to succeed long-term, your clients and internal employees need to understand what you are doing with the feedback they have provided.



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