

ClearlyRated™ for PEO Organizations

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



Who is Inavero?

Headquartered in Portland, Oregon, Inavero 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 PEO organizations credibly differentiate themselves based on the service they provide.

What is ClearlyRated™?

Inavero's 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.

What is "Best of HR Services™"?

Participating PEOs are eligible to earn Inavero's annual "Best of HR Services" award for service excellence. Winners are publicly acknowledged for their service accomplishments and are listed on ClearlyRated.com.

INDUSTRY PARTNERS



Associate Member
National Association
of Professional Employer
Organizations

Net Promoter® Methodology

The ClearlyRated client survey uses 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?” It’s 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

“The Inavero team is responsive, smart, consultative and professional. For any company doubting the difference between what Inavero 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 PEOs to measure and grow client 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 become client 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 ClearlyRated.com profile (along with testimonials from clients who love you).



Win a 3rd-party award for client satisfaction

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



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 company 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, PEO businesses 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 company. This metric determines if your firm earns the Best of HR Services™ award.

After a decade of client satisfaction research for professional service firms, Inavero 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, [x]* 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

(0 – Not at all likely and 10 – Extremely likely)

(Please note: If you have problems loading the survey, you may also copy the entire link into your web browser.)

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]

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

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

Incentives are optional and managed by your company. 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.

Who to Survey

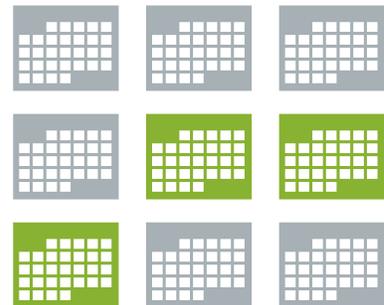
Surveying your clientele with ClearlyRated grants your company eligibility to win the annual Best of HR Services™ award for service excellence. Each participating PEO must pass the eligibility standards before they can move forward to earn the award.

Preparing Your Contact List

To be eligible for the Best of HR Services award for client service excellence, **choose at least 3 consecutive months over the last 12 months**, and provide Inavero 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 PEO organizations 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 PEOs maximize the ROI of their survey program.

MYINAVERO

Your online dashboard of survey responses.

PINPOINT PRACTICE AREA ISSUES

Why is our Benefits 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.

RETAIN AT-RISK ACCOUNTS

Partner needs to look into Gerald's issue.

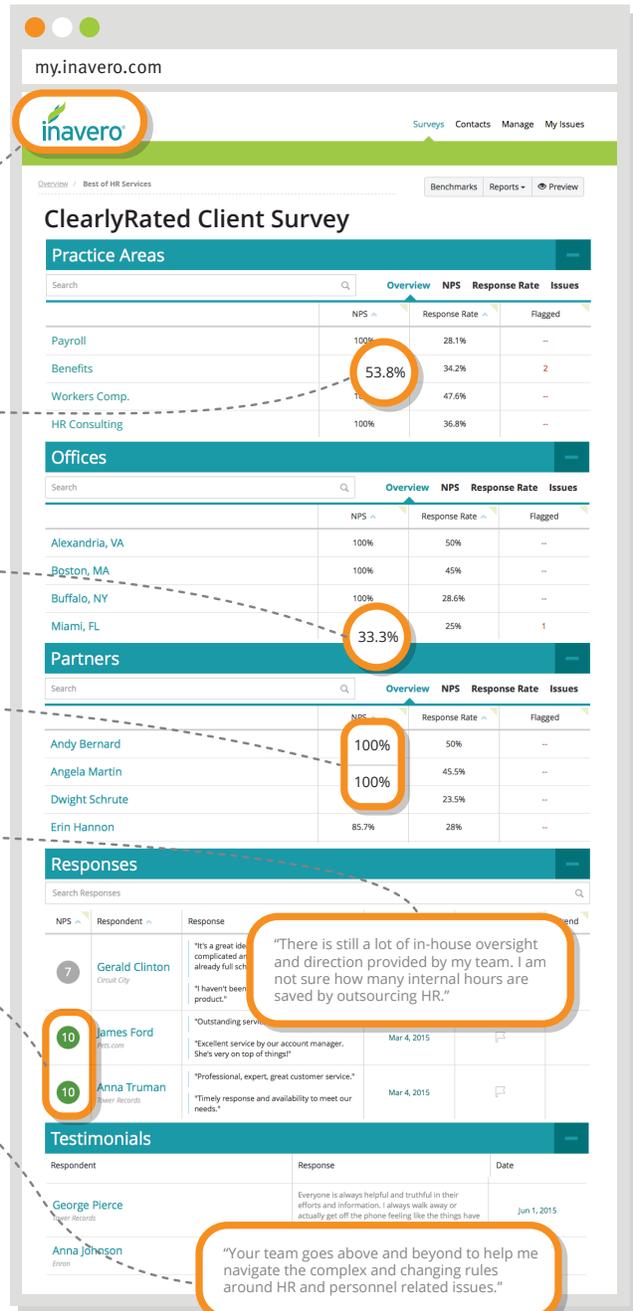
GET REFERRAL PROSPECTS

Ask for referrals from James and Anna!

GET FRESH TESTIMONIALS

Great testimonial. Get on website and proposal template today.

Plus/Enterprise reporting package shown.



How to Use Responses in Your Business

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

MYINAVERO
Your online dashboard of survey responses.

PINPOINT PRACTICE AREA ISSUES
Why is our Benefits 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.

my.inavero.com

Surveys Contacts Manage My Issues

Overview / Best of Best of HR Services

Benchmarks Reports Preview

ClearlyRated Client Survey

Practice Areas

Search	Overview	NPS	Response Rate	Issues
		NPS ^	Response Rate ^	Flagged
Payroll	100%	53.8%	28.1%	--
Benefits	100%	53.8%	34.2%	2
Workers Comp.	100%	47.6%	47.6%	--
HR Consulting	100%	36.8%	36.8%	--

Offices

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

Partners

Search	Overview	NPS	Response Rate	Issues
		NPS ^	Response Rate ^	Flagged
Andy Bernard	100%	100%	50%	--
Angela Martin	100%	100%	45.5%	--
Dwight Schutte	100%	73.5%	73.5%	--

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.

MYINAVERO
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.

The screenshot shows the my.inavero.com dashboard for a 'ClearlyRated Client Survey'. The interface includes a search bar for responses, a table of responses with columns for NPS score, Respondent, and Response, and a section for testimonials. Several elements are highlighted with orange callouts:

- The my.inavero logo is circled in orange.
- The NPS score '7' for Gerald Clinton is circled in orange.
- The NPS score '10' for James Ford is circled in orange.
- The NPS score '10' for Anna Truman is circled in orange.
- A callout box highlights a response from Gerald Clinton: "There is still a lot of in-house oversight and direction provided by my team. I am not sure how many internal hours are saved by outsourcing HR."
- A callout box highlights a testimonial from George Pierce: "Your team goes above and beyond to help me navigate the complex and changing rules around HR and personnel related issues."

NPS	Respondent	Response	Date
7	Gerald Clinton Circuit City	"It's a great idea, complicated and already full sch... "I haven't been product."	
10	James Ford Pets.com	"Outstanding service and value." "Excellent service by our account manager. She's very on top of things!"	Mar 4, 2015
10	Anna Truman Tower Records	"Professional, expert, great customer service." "Timely response and availability to meet our needs."	Mar 4, 2015

Respondent	Response	Date
George Pierce Tower Records	Everyone 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	Jun 1, 2015
Anna Johnson Enron		

Plus/Enterprise reporting package shown.

Star Ratings and Testimonials to Inform Buyers

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. The features on your company's profile page will depend on the number of locations you have, along with your survey package.

BRAND LOGOS

- BASIC
- ✓ PREMIUM
- ✓ PLUS
- ✓ ENTERPRISE

LOCATION

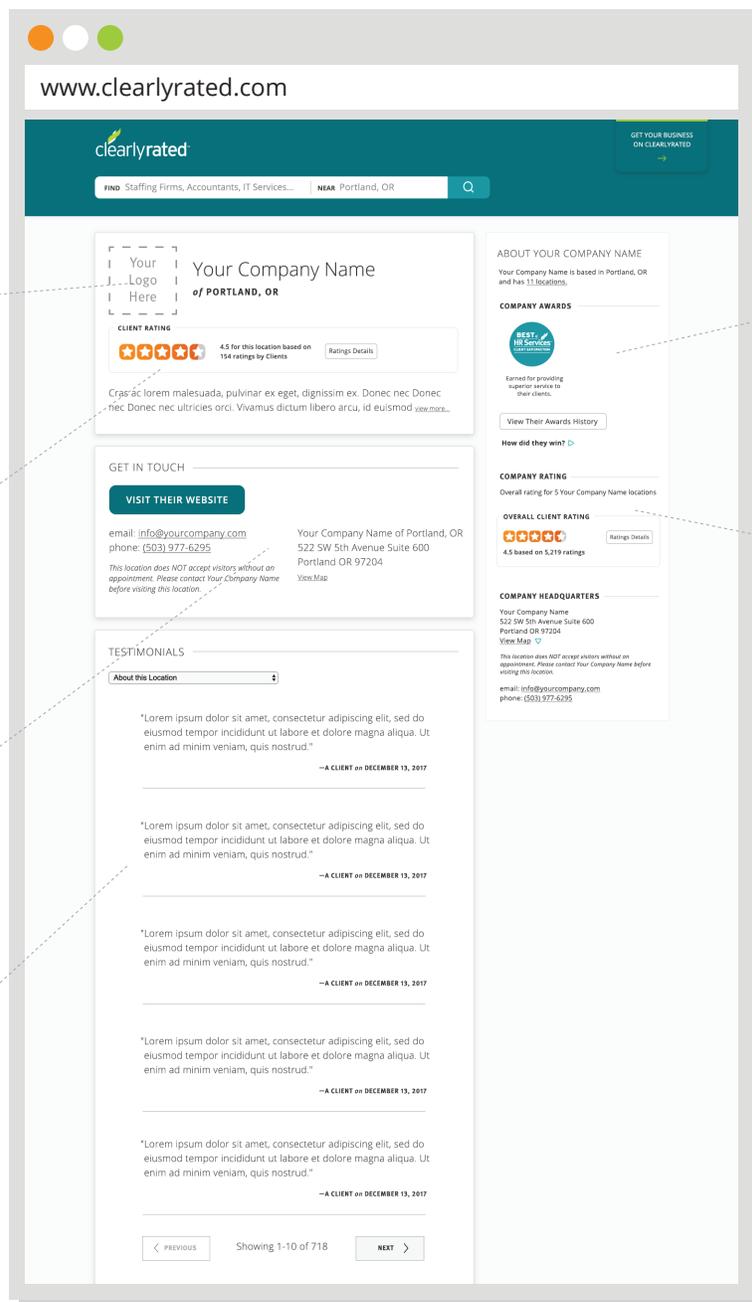
- ✓ BASIC
- ✓ PREMIUM
- ✓ PLUS
- ✓ ENTERPRISE

CONTACT INFO

- ✓ BASIC
- ✓ PREMIUM
- ✓ PLUS
- ✓ ENTERPRISE

TESTIMONIALS

- BASIC
- ✓ PREMIUM
- ✓ PLUS
- ✓ ENTERPRISE



AWARD BADGE

- BASIC
- ✓ PREMIUM
- ✓ PLUS
- ✓ ENTERPRISE

BRAND

- ✓ BASIC
- ✓ PREMIUM
- ✓ PLUS
- ✓ ENTERPRISE

ClearlyRated Pricing

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.

1 How many companies did you serve last year?

2 Survey Package Options & Pricing

	#	STANDARD QUESTIONS	CUSTOMIZED QUESTIONS
Annual Survey	1x/year		
Semi-Annual Survey			
Quarterly Survey	4x/year		
Post-Implementation Survey			

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.

Quick Compare	BASIC	PREMIUM	PLUS	ENTERPRISE
NPS® Drivers Satisfaction Survey (8 questions)	✓	✓	✓	✓
Real-time access to survey results	Anonymous Responses	Full Access	Full Access	Full Access
Star ratings on ClearlyRated.com	✓	✓	✓	✓
Access to ClearlyRated Marketing Guide		✓	✓	✓
Get fresh testimonials		✓	✓	✓
Real-time email alerts		✓	✓	✓
Get internal employee shout-outs		✓	✓	✓
Best of HR Services award logo (winners only)		✓	✓	✓
Best of HR Services Toolkit (winners only) Social media tools Press release template		✓	✓	✓
Issue Resolution Tracking			✓	✓
Get NPS by Partner, Industry, Practice Area, or Client Company			✓	✓
Additional survey questions (up 10 to total)				✓
API access				✓



© 2018 Inavero, Inc. All Rights Reserved. Net Promoter, NPS, and Net Promoter Score are trademarks of Satmetrix Systems, Inc., Bain & Company, and Fred Reichheld.