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To Survey or Not to Survey?

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In our complex and hurried day-to-day activities, we sometimes forget to do the simplest things. We plan, we organize, we create elaborate marketing campaigns, and we work tirelessly to calculate return on investment. However, many times we forget to ask the very people on whom we are expending so much energy and effort the most simple of questions: “Dear client: How are we doing?”

Sound familiar?

As with any relationship, you need to ask some tough questions and be prepared for the answers. This simple revelation makes it imperative for your firm to have a systematic approach to surveying clients. The information gleaned from this process is invaluable to measuring client loyalty and targeting areas for improvement.

So how do you get started? I highly recommend hiring a professional. Could you do it internally? Yes, probably. Would the results be objective and validated? Probably not. In addition, the experience and scope of knowledge gained by contracting a seasoned professional will allow you to benchmark your answers and gain insights and best practices from a professional’s experience and expertise.

Here are some items to consider when developing a client satisfaction survey:

- Start with the end in mind. Figure out what you want to know and who should receive the survey. Develop questions that reflect the information you desire to obtain. Invest time creating the right questions to meet your needs. Next, determine the best time to conduct your survey. For instance, will you survey clients all together once per year or will you survey each client upon completion of your work with them?
- Develop a process that is user-friendly. The easier you make it for the client, the more likely they will be to complete the survey.
- Communicate the value of a survey to partners from the beginning and educate them about the survey process. This ensures that they will buy in to the process, and thus, they will encourage their clients to participate.
- Determine how you’ll respond to negative comments. Have a clear practice management plan in place before beginning the process so that there are no surprise reactions.
- Create a detailed communications plan, covering how information will be distributed and used, and how/if the findings will be shared internally and externally.
- Develop a plan to follow up with clients post survey. Express gratitude for their time and feedback.

As you can see, a client survey is a major undertaking. It should be approached with zeal and excitement as there is crucial intelligence that can be gleaned from the only opinion that really matters: the client's. If handled properly, a client satisfaction survey can help define your culture and differential points, determine best practices, identify rainmakers, illuminate weaknesses and provide the information needed to better manage your respective practices.

In the end, there is never a substitute for asking the simplest of questions: How are we doing? To survey or not to survey; that is the question. Do you have an answer?

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