

CLIENT SURVEY BY PHONE (sample)

CLIENT NAME: (omitted)

DATE OF SURVEY: (omitted)

INTERVIEWER'S ASSESSMENTS: Mr. (client's name) returned my call and was immediately available to do the survey. He acknowledged that he has had a long-standing quality relationship with your firm. This survey reveals a significant opportunity for your firm to enhance and expand your relationship with Mr. (client's name) by

- 1.) heeding his suggestion to "sit down" and redefine the relationship, and
- 2.) accepting his offer to consider any additional services that your firm could provide.

THE SURVEY:

On a scale of 1 to 10... 10 being the best...

Question:

1. How would you rate (name of firm) on understanding your needs?

Response: 7

"We've had a long relationship. Sometimes I think when you work with the same company for so many years, you just keep things operating the same. I think it would be useful if they reassessed our needs. I would recommend their interviewing us, asking what our concerns and our needs are. Just asking, checking in beyond the work that we already do together would be helpful."

Question:

2. How would you rate (name of firm) with regard to the quality of advice you receive?

Response: 8

"In terms of being able to quote specific policies and the law, I think they are good at that. For the most part, the advice I get from their people is very practical. But, I feel that they could still do a better job of relating that to our specific business needs."

Question:

3. How would you evaluate their ability to meet deadlines?

Response: 9

"They do a good job of laying out what time frames they plan to stick to. They're also good at accommodating last-minute scheduling needs."

Question:

4. How would you rate (name of firm)'s responsiveness to your needs?

Response: 9

“They are very responsive. Whenever I leave them a voice message or email, I know that I’ll be contacted right away. I appreciate that.”

Question:

5. Is there anything you would like (name of firm) to be doing that they are not doing now?

Response:

“It might be an improvement to be given an estimate of what their services would cost. Their bills sometimes surprise me. Especially because we deal with them on a monthly basis, providing us estimates would help our financial planning. It would be a benefit.”

Question:

6. How do you perceive the value that you’re receiving from (name of firm)?

Response: 10

“I deal with four different firms. On a comparative basis, (name of firm) is the top. They are very competitive in terms of the cost of their services.”

Question:

7. How do you rate the firm’s energy and determination in pursuing your goals?

Response: 8

“It would be great to do more planning together. To review; What is our relationship? What am I providing them and what are they providing me? What else could we do together? There may be other services they could provide us. The person we had been dealing with at (name of firm) left a year ago, and now we are dealing with another person, who is fine. But that transition was rocky for us at first and I think it would be helpful if we just sat down together to review and plan.”

Question:

8. What are the areas where you would like to see improvement in (name of firm)’s work for you?

Response:

“Sometimes their billing is a bit obscure. It’s not so much that it’s vague; it’s very detailed. But it’s unclear the way it’s presented exactly what the given task relates to. Other than my earlier comments, I have no other feedback. Generally I am very happy with their firm.”