

# The best free advice there is.. Annual Client Surveys

By J. Michelle Sybesma, Professional Skills Consulting

[jms@skillsconsulting.com](mailto:jms@skillsconsulting.com)

If you ask children why they like their favorite restaurant, you are likely to hear that they have 'the greatest toys' or 'the neatest kid's meal' or simply that they like their "play equipment'. Why would their answers likely be so consistent? Marketing plays a large role. However, when we look past marketing as a whole, we are likely to find that these companies cater to the needs of their best clients. Because they know what it is that their client likes and what their disinterests are.

**How can you use that same technique to make your business successful?** Existing clients represent successful sales. Therefore, they are a wonderful resource. In order to maximize their input, it is important to ask their opinion. Place an Annual Client Survey on your list of things to do, and DO IT!

**What should you ask them?** Depending on your knowledge needs, the answer to this question may vary. Because you should value your client's time, do not create surveys that require lengthy answers. Simple check the box options are the best for the majority of questions.

Use as system of scaled checkboxes ranging from poor to great to condense multiple questions into quick answers.

What do you feel the quality of service we offer is in the following areas?:

- Accessibility
- Consistency
- Cost Effectiveness
- Dependability
- Education of our services
- Follow up
- Foreseeing your needs
- Friendliness of Admin Staff
- Friendliness of Sales Staff
- Meeting your needs
- Timeliness

Surveys can be a great way to determine things like the preferred method-of-contact of your target demographic. You might ask what types of advertising they prefer:

- Direct mail
- Email campaigns
- Newsletters
- Seminars
- Websites
- Coupons
- Other \_\_\_\_\_

Consider asking clients if they would feel comfortable to refer you to their associates: Yes or No. This may prompt the client to realize you are looking for new business and appreciate their referrals.

Finish by formulating a list of questions that you might have for a "dream" prospect. Ask them to answer their favorite question of the three. [If you are lucky, they may answer all of them.] This also allows you to receive answers to three different questions without forcing everyone to spend great time responding to them.

- What attracted you to "our company"?
- What do you feel we offer you that is better than our competitors?
- If you could choose three words to describe our products/services would they be?

Make sure you **clearly define to whom the survey will be delivered**. This helps to ensure that your clients feel comfortable answering honestly.

**Provide an incentive** to those who participate, such as a give-a-way or a discount on future services. Provide a disclaimer that winner will be announced or posted on your website or in your newsletter. This produces credibility in your incentive and produces web hits.

**PROFESSIONAL SKILLS CONSULTING**

[www.skillsconsulting.com](http://www.skillsconsulting.com)

317-596-9855 Office

317-596-8993 Fax

**Keep survey separate from entries for prizes.** This will allow multiple people/departments to manage functions. Do this by creating a separate card for drawings that can be removed from survey.

**Keep surveys clean and simple,** a single page. Avoid emailing surveys. They are less likely to be responded to and it downplays their significance. Instead, mail them from your office or a remote location. Larger companies may wish to research third party companies who specialize in data compiling.

**Explain the survey is important to you, because THEIR OPINIONS are important to you.** Therefore, plan to act on their responses. Schedule time to review them into your calendar. If you take the survey and never address an issue, such as a rude staff member, they will likely not participate in future surveys. In addition, all the time invested has been a waste for everyone. Make the most of them!

**Avoid sending the EXACT same survey every year.** Unless you are giving away *big* prizes, the same survey gets boring and

even insulting. Be creative. It is also acceptable to create a theme to model all questions around, such as your website or product changes. As long as you explain that you have chosen a focus. In addition it is important to provide an opportunity for them to write-ins comments regarding other issues they would like to address.

**Make it easy to respond.** Include in each a return stamped self-addressed envelope.

Remember, the survey questions have two distinct purposes:

1. What makes your clients stay with your company.
2. What might cause them to leave.

**Share the results with your staff.** Set aside staff meetings to address both issues and praise.

If you have created a survey that answers these questions, then you will have a successful survey. Enjoy them, as they can assist your company greatly.

*J. Michelle Sybesma is a business consultant specializing in organization, staff retraining, and productivity. For further information contact Professional Skills Consulting at 317-596-9855 or visit [www.skillsconsulting.com](http://www.skillsconsulting.com).*