YARDSTICK

CHECKLIST SERIES

Checklist #8 : Building effective client surveys

From providing you with useful information about where you can improve to giving you important social proof to use in your marketing, client surveys will help you grow your business.

In fact, we believe they are so important that we advocate running a client survey before embarking on any major project, such as making significant changes to your business, developing a marketing strategy or building a new website.

You can read more about why they are so useful by **clicking here**.

So, if now's the time to take the plunge and ask your clients for their views, we must establish how to produce an effective survey; one that clients will respond to and will, in turn, give you the information you need.

Here's our top tips:

1

Decide what you want to achieve

Until you understand what you want to achieve, it's impossible to move forward.

In our experience, most advisers and planners have several key aims:

- To collect social proof to use on their website and in their wider marketing
- To understand what services clients truly value and where your business can improve
- To test and understand how clients feel about new ideas and initiatives
- To understand client behaviours

You may have other reasons but, until you understand what they are, you can't move on to stage two.

At this stage, it's sensible to seek the input of any external advisers and consultants you work with. For example, your marketing support will know the data and information they will find useful, while your business consultant will have their views on what you should seek to achieve.

Done

To do

Not for us

2

Agree your questions and the format

Less is more. In other words, the shorter the survey the more likely a respondent is to answer every question.

Think carefully about the questions that will provide your social proof and how you will display the answers on your website. The questions need to be formatted so that the data you receive can be displayed simply, effectively and ideally graphically. You can see an example of how this is done by **clicking here** and scrolling down the page.

The way you allow respondents to answer is as important as the question itself. Some questions will suit closed answer sets, possibly followed by a section for comments to be added; others will work better as open questions, allowing the respondent free reign as to how they answer.

Done

To do

Not for us

3

Gear your survey for gathering social proof

Offering your clients the opportunity to give feedback on your service is not only a valuable tool for improvement, but also a clever way of gathering social proof for your marketing.

End the survey with a testimonial request; it should also include a field for clients to select whether you can attribute the quote to them in your marketing. Most will agree, but it saves you having to go back in the future to ask.

Think too about whether you will give clients the option of completing the survey anonymously. Some advisers and planners feel that doing so gives clients the ability to be more candid than they otherwise might have been.

Done

To do

Not for us

4

Decide on how you will build your survey

Where practical, we recommend that client surveys should be built and sent electronically.

We use **Survey Monkey** to build the surveys we run for clients; it's effective, relatively simple to use and makes analysing the data easy. It also works well on mobile devices too, which many of your clients might use when completing the survey.

The free version provides basic functionality and allows you to include up to 10 questions in your survey. The standard version (which costs £35 per month, but can be turned off when you have completed your survey and downloaded the results) provides additional functionality and allows you to customise the survey with your branding.

Once built, Survey Monkey provides you with a link which can be sent to clients. More of that in a moment.

Done

To do

Not for us

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Produce a hard copy

If you have clients who aren't online, a hard copy of the survey could be produced and sent to them in the post.

However, this makes collating and analysing the responses a more onerous task and therefore should be a secondary option; used only where the combination of electronic survey and email isn't appropriate.

Done

To do

Not for us

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Testing

Before sending the survey to your clients we recommend two stages of testing. Firstly, test the survey with members of your team, asking them to complete it multiple times, giving different answers on each occasion. Secondly, test the survey with a small selection of hand-picked clients who you trust to give honest feedback on the questions (the content and style) and the ease of use.

The survey can then be refined as necessary before sending it to your clients.

This testing stage is vital and shouldn't be overlooked. It will help you identify any errors or weaknesses in the survey which will compromise the results. Having the survey proofread is also important; typos reduce confidence and make you look unprofessional.

Done

To do

Not for us

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Decide how long you will leave it open

We recommend against leaving the survey open indefinitely.

A fixed period of say two or three weeks will create a sense of urgency and allow you to send a follow-up email to those who have not responded reminding them of the closing date.

It will also create a cut-off date when you can start to analyse and use the data.

Done

To do

Not for us

8

Send the survey

The goal is to have as many fully completed surveys as possible. How you send the survey will have a significant impact on the proportion of clients who open the email and subsequently answer the questions.

If you are using Survey Monkey (or similar), we recommend sending the link in a personalised email. To make the process more efficient you should produce carefully written standard text, to which you then add a personalised introduction. If possible, we recommend against sending, non-personalised bulk emails.

The standard text should explain:

- Why you are asking clients to complete the survey (e.g. you're building a new website, or you're testing some new ideas for services which you may offer)
- How it will benefit both your business and the service they receive
- How you will use the data
- Approximately how long it will take to complete the survey
- The date by which you would ideally like them to have completed the survey

It should conclude with a heartfelt message of thanks for taking the time to complete the survey.

Done

To do

Not for us

9

Send a reminder

Not everyone will respond to the first email you send.

Therefore, a polite nudge a few days before the survey closes, to those who have yet to complete it, will increase the proportion of clients who respond.

Done

To do

Not for us

10

Say thank you

After every response, we recommend sending a quick email of thanks.

Again, this can be templated and personalised where necessary. However, recognising the time and effort spent by the client in completing the survey is important.

Done

To do

Not for us

11

Analyse the data

You will probably have monitored individual responses as they come in; the temptation to do otherwise is too great! However, once the survey has closed, now is the time to analyse the data.

Survey Monkey allows you to easily export answers to Excel, either as an overview report or as a report which details the separate responses from individuals. Naturally, both are worth downloading, examining and analysing.

Your findings can then be shared as appropriate with other members of your team and your external advisers or consultants.

Done

To do

Not for us

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Implement evidence-led change

With the data you have gathered you can then:

- Include the social proof in your marketing and on your website
- Amend or improve existing services
- Introduce the additional services or initiatives which were received positively

Done

To do

Not for us

We hope this helps

We believe that a client survey should be run before any major change to your business.

Like all things, it is a project which can be run internally or outsourced to a specialist. If you take the former option, we hope this checklist proves useful. However, if time and resources do not allow you to take on the project, we would be delighted to run the survey for you.

If you would like to learn more about working with us on your client survey, please call **0115 815 7770** or email **hi@theyardstickagency.co.uk**

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