



CAPSTONE MARKETING



Questions to Consider For Your Accounting Firm's Client Satisfaction Survey



Our eBook, [Client Satisfaction Surveys for Accounting Firms](#), answered the most frequently asked questions about creating and implementing a client satisfaction survey. Here is a list of questions for you to consider when creating a client satisfaction survey for your firm.

Need help? Contact Jean Caragher, 727.210.7306 or jcaragher@capstonemarketing.com.

Let's start with the Net Promoter Score, or NPS®, developed by Satmetrix, Bain and Company, and Fred Reichheld, author of [The Ultimate Question](#):

How likely are you to recommend to a colleague or friend?

NPS is based on the perspective that every company's customers can be divided into three categories:

- **Promoters** (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- **Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- **Detractors** (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

Learn more about the [Net Promoter Score](#).

Other questions to consider for your client satisfaction survey:

On a scale of 1 to 5, with 5 = Very Important and 1 = Not at all Important, please rate how important each characteristic is in choosing a CPA firm.

- Competitive fees
- Industry expertise
- Location
- Integrity and ethics
- Name recognition of firm
- Personal relationships
- Personality of CPA team
- Professionalism
- Range of services
- Reputation
- Size of the firm
- Technical expertise

On a scale of 1 to 5 with 5 = Strongly Agree and 1 = Strongly Disagree please rate each statement according to how you are feeling right now.

- XYZ Firm professionals take initiative in offering business advice.
- XYZ Firm provides high quality services to me on a consistent basis.
- I am aware of the complete range of services offered by XYZ Firm.
- XYZ Firm professionals proactively bring me ideas relevant to my industry.
- I find XYZ Firm's eNewsletters useful.
- XYZ Firm completes their work in a timely manner.

On a scale of 1 to 5 with 5 = Very Satisfied and 1 = Very Dissatisfied please rate your level of satisfaction in the following areas:

- Our availability when you need us
- Technical competence of our staff
- Timeliness of work
- Overall satisfaction with the service you received

Compared to last year, our performance is:

- Much improved
- Improved
- About the same
- Worse
- Much Worse

What, if anything, has changed?

During the past 12 months, have you seriously considered changing accounting firms?

What do you enjoy most about working with XYZ Firm?

What would you like us to do differently?

What services could XYZ Firm provide to you that would add value to our relationship if price weren't an issue? (Check all that apply) (List services in alphabetical order. Don't forget to add a "Comment" or "Other" field so clients can add services that aren't listed.)

What do you see as the major strength of XYZ Firm?

What is the major weakness of XYZ Firm?

What is the one thing that will make doing business with us even better?

Other Best Practices for Survey Creation

SurveyMonkey offers these additional best practices:

- Don't ask leading questions, e.g., those that include your own opinion into the question prompt.
- Keep your answer choices balanced, e.g., choices that do not lean more positively or negatively.
- Preview your survey before you send it. Better to notice typos, missing questions and other mistakes ahead of time. Even better, have a couple of your colleagues test the survey in advance.

I hope you found this information helpful.

Good luck!

Jean Caragher
Capstone Marketing



Jean Caragher gets things done. For CPA firms seeking to improve their marketing, Jean is the go-to resource for strategy and implementation. With 35 years of experience working solely with CPAs, Jean knows the challenges and opportunities firms face today. Her experience and knowledge, combined with her practical approach, help growth-focused CPA firms attract the best clients and talent.

A well-respected industry specialist, Jean is an inaugural AAM Hall of Fame inductee, a multiple AAM-MAA award winner, and a *CPA Practice Advisor* Thought Leader. Prior to launching Capstone Marketing in 1998, Jean served as a CPA firm marketing director and association executive director. She has twice been named one of *Accounting Today's* 100 Most Influential People in Accounting. She is a HubSpot Certified Partner and a Certified Instructor of Fore LLC's Advanced Pricing Methods®.

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If you're ready to conduct a client satisfaction survey for your accounting firm
or have other questions regarding client satisfaction and retention
click the button below to arrange a free consultation!

Let's Talk!

