



Anna Lake Consulting

## GET STARTED WITH CLIENT LISTENING - FOR FREE!

Client listening is a great way to grow your business – it will help you to retain existing clients and attract new ones. Getting started needn't cost you any more than your time – here are five things you can do to get started with client listening which won't cost you a penny!

### 1) SORT YOUR DATA

Even if you don't use a formal CRM system, you probably have at least an excel spreadsheet or Google sheet listing your clients and data such as their tax returns and annual report dates. Add a column (or a field if you do use a CRM), and enter the date on which you last sought or received feedback from that client.



### 2) IDENTIFY POTENTIALLY AT-RISK CLIENTS

Identify 'the quiet ones' – the ones you've not had a meaningful conversation with for six months or more or who haven't provided any feedback (directly to you or via a review site) in that period. These are the ones to watch – they may not be particularly unhappy, but they are the ones who may have minor niggles which need addressing before they are swayed by another accountant. Perhaps now is a good time to give them a call to see how things are going....

### 3) COMMUNICATE

Communicate your commitment to discovering what they think via all your channels – in your newsletter, on social media and via a blog on your website. By doing this you're more likely to receive unsolicited feedback, reviews on Google or other sites and get a better take up of your survey. Which leads me to....

“I approached Anna to gain a better understanding of how to collect and use client feedback. I am a relatively new business so wanted to capture feedback as I go along. Anna explained different capture methods and encouraged me to ask for feedback for my website and on Google. I came away from the meeting so excited to start and it's done wonders for me. I would definitely recommend Anna to anyone who needs guidance on client listening”

- Fran Harris, Full Accounting Services



#### 4) DEVISE A SHORT SURVEY

Survey fatigue is real! We're asked to complete surveys and give feedback on all sorts of goods and services so whilst online surveys are a quick and free way to gain feedback, please keep them short.

Start with the end in mind and think about what you really want to know, then draft your questions. I would recommend asking the following:

- Questions which help you find out how your brand promises (what you say on your website) match client reality
- Open questions that ask what you do well, and where you might be falling short of expectations
- One metric question – choose Net Promoter Score (which measures future loyalty) or Client Satisfaction (which measures current satisfaction)
- Ask if they'd be happy to give you a testimonial.



#### 5) SHOUT FROM THE ROOFTOPS!

By being brave enough to ask your clients for their thoughts, you're bound to uncover some great comments you can use on social media and your website. It's so much more compelling to say 'our clients tell us xxxx' rather than just 'we're responsive/proactive etc'. Social proof (which is what positive comments and testimonials give you) is so important – it takes away much of the hesitancy around appointing a new or switching existing supplier.

And if you uncover some areas where you're less than perfect, that's great too – honestly! It might feel uncomfortable but it's so important to receive that feedback. It gives you an opportunity to learn and improve and build even deeper and more trusting relationships with your clients. If you're really brave you can talk about the areas for improvement and what you've done as a result – that shows real integrity, a trait all businesses want in their advisers.

I hope this has given you some ideas for how you can get started with client listening yourself. If you do need some support, either to get started or for advice on what to do with the feedback you have already, please email me or [BOOK A CALL](#).