

Client Survey Case Study

Client

National accounting specialist dedicated to the licensed trade.

Campaign brief

To assess level of satisfaction with current services; to ascertain whether there are additional services required; to ascertain frequency of services and frequency of personal contact.

The subsequent analysis was used to pinpoint areas of service delivery that require attention and highlighted potential new services to develop.

Client services

Helping licensees with all aspects of financial control and regular reporting; offering a complete service right through to the submission of tax returns including Management Accounts, Site Reviews, Full Quarterly VAT Service, Year End Accounts, Payroll and all aspects of Taxation.

Target data

Current clients.

Telemarketing process

Calls to named contacts to ask if they are able to undertake a short survey immediately, alternatively to book a time to call back. Record answers accurately and feedback actual responses and a brief analysis of the results.

Results

We experienced a very positive response from licensees to answering questions that may subsequently be used to enhance services.

This work provided our client with analysis as a genuine base for making both marketing and service decisions.

Partner Quote

"our recent customer survey performed by Chartered Developments was found to be hugely relevant to shaping future business strategy; it highlighted key areas for discussion regarding client relations and customer service, moreover it focused our attention on what was actually required"

Steve Carter, Director, MSLTA Ltd (Licensed Trade Accountants)