

Invaluable insight from surveys

Surveying clients and prospects can provide invaluable insight. The process doesn't need to be complicated in order to deliver worthwhile feedback.

Your survey can be completed in person, over the phone, or on-line.

You can get feedback on the quality of service received, ask for ideas and suggestions, or check out local business conditions.

In a prospect survey you might uncover what is really important to your prospects, what they're thinking, what motivates them and what concerns them.

It is important to be clear on who you want to survey – clients, prospects or both?

Keep the questionnaire short, and let them know how short it is (if it's only 3 questions, tell them).

Use simple language – and no jargon.

Don't ask leading questions – e.g. the question "What type of tax planning interests you the most?" leads respondents to pick a type of planning without first determining if they even want to undertake tax planning.

Use closed questions rather than open-ended –quicker for respondents to complete and makes analysis easier.

Include a section for their contact details – if not you may struggle to discover afterwards who said what.

Set up and test your survey – get someone other than the writer to test it as you may not have thought of all possible responses. If 'I'm not sure' is a possible answer, make sure you include it.

Think about offering an incentive for people to complete your survey – e.g. a free gift, a download or something they can claim at their next meeting with you.

Send respondents to a landing page when they've finished the survey to say 'thank you' (and collect their gift, if applicable).

Set an end date and let them know how long they have to complete the survey. You may also want to build in a reminder email a few days before the deadline.

Leave an 'Other comments' section at the end of your survey. Sometimes respondents offer casual remarks that are worth their weight in gold and cover an area you did not think of, but which respondents consider critical.

Get in touch to discuss how ad+ could help you plan and manage the growth of your business. Your initial meeting will be free of charge and without obligation.

Survey question ideas

Pick just three or four questions from the suggestions below. If you are using an on-line survey, consider putting only one question per screen view to save respondents having to scroll down the page.

Questions for clients

1. How happy are you generally with the quality of the response from [firm name] when you need to contact us?

- Extremely happy
- Happy
- Satisfied
- Not satisfied (please state reason)
- Very unhappy (please state reason)

2. How satisfied were you with your last experience of dealing with [firm name]?

- Extremely satisfied
- Moderately satisfied
- Neither satisfied nor dissatisfied
- Moderately dissatisfied
- Extremely dissatisfied

3. How strongly do you recommend [firm name]?

- Extremely strongly
- Very strongly
- Moderately strongly
- Slightly strongly
- Not at all strongly

4. How well do you think [firm name] understands what your business needs to be successful?

- Extremely well
- Very well
- Moderately well
- Slightly well
- Not at all well

5. How important do our team members make you feel when you contact us?

- Extremely important
- Very important
- Moderately important
- Slightly important
- Not at all important

Questions for prospects

1. Which state best describes your business at the moment?

- It's running comfortably and I'm happy with the profits generated
- It's running well but I'm always looking for improvements
- It's not generating the income I need it to
- I wish I'd never started the business
- Other (please state)

2. How long has your company been in business?

- Less than one year – we're a start-up business
- One to three years
- Four to ten years
- Eleven to twenty-five years
- More than twenty-five years

3. How many team members does your business employ (including directors and managers)?

- 0 - 5
- 6 - 10
- 11 - 20
- 21 - 50
- More than 50

4. What is currently your biggest business challenge (please tick all that apply)?

- Recruitment, retention or motivation of your team
- Generating enough profits to pay yourself or your team
- Lack of cash flow
- Lack of time to manage everything to a high enough standard
- Collecting your outstanding debts
- External threats (the economy, competition)
- Other (please state)

5. What would you like your business to look like in five years' time (please tick all that apply)?

- Running itself with very little input from me
- Much bigger than it is now
- Generating much higher profit margins
- I'm hoping to have sold it within the next five years
- Pretty much the same as it is now
- Other (please state)

Questions for either clients or prospects

1. What are your personal feelings about the current state of the local economy?

- I'm optimistic that my business will grow in this economy
- I'm happy with the current status and the economy doesn't really affect my business
- The economy isn't helping my business to grow – I'm struggling to raise the funds I need
- I believe things are going to get worse
- Other (please state)

2. Do you believe the current government is doing everything in its power to help small businesses?

- Yes, I'm happy with things as they are
- Yes, although I'm sure there is room for improvement
- No, there are a few things that need changing
- No, we need radical changes in order to survive
- Don't know

3. What would be your top priority if you could influence change in one area?

- Reduced basic corporation tax levels for small businesses
- More tax breaks on the research and development of new products
- More incentives to employ young people
- Tax breaks for companies having greater involvement in the local community
- Clearer legislation on taxation generally

4. Over the next five years, do you want your business to:

- Expand rapidly
- Achieve moderate growth
- Stay the same size
- Become leaner/smaller

5. [If growth selected in previous question] Do you know how you will achieve this?

- Yes, we have a 5-year plan with firm goals
- Yes, we have outlined plans but no clear goals yet
- We'll carry on doing what we are doing now
- Not yet, it's just a target with no firm plans
- Other (please state)

6. Do you have a business plan with clearly defined goals that is shared with the whole team?

- Yes
- We have a business plan but it's shared at senior management level only
- We have plans to develop a proper plan to share but it's not completed yet
- No

7. How do you generally collect payments from your customers? (Please state for the majority)

- Cash or cheque
- Credit card
- Direct debit
- PayPal or other online payment services
- Other (please state)

8. What is the extent of your firm's involvement within the local community of [town]?

- Our firm actively supports community projects or other charitable work
- A few members of our team are involved with fund raising
- We'd like to get more involved but don't have the time or resources
- We don't really get involved with any community projects
- Other (please state)