



CLIENT SURVEY

2022



Forrester Boyd
CHARTERED ACCOUNTANTS



02 Summary Overview

This year's client survey was sent out to 2,729 clients. We received 178 responses. This is a response rate of 6.5%.

As a comparison, last year the survey was sent out to 1,368 hand selected clients with a response rate of 6.5% so very consistent in terms of our response rates.

This report provides a summary overview of the results.



“

**Fill the Void ...
...with Forrester Boyd**

”

This was one of the catchy comments from a client who completed the survey.

The vast majority of the respondents, replied positively about Forrester Boyd and the services that we offer. For the couple of negative responses that were received, this provides us with the opportunity to see what we can do to 'turn their frown upside down'.

Some of the other comments from clients included things like "I feel in safe hands" and "Friendly, honest and informative team who treat you like a colleague, not a customer."

There are many pieces of intelligence that we can draw from this survey to help us to shape our services, but also help our clients to achieve their goals. With 31% of clients looking to increase profitability or look after existing clients and 18% looking to reduce overheads, there are definitely areas that we could be looking at in terms of services to clients.

Communication whilst good, can also be improved upon as requested by some clients. Training and support with cloud accounting packages is also another area where interest has been shown.



03

How do we rank

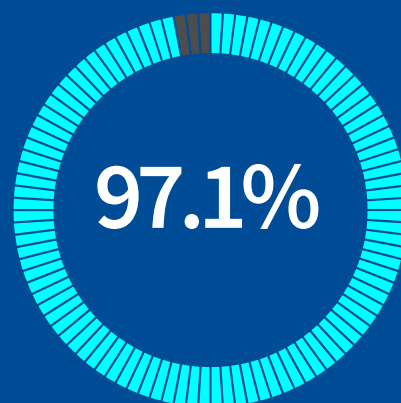
We asked clients how they rated us on a number of criteria. 178 clients responded to our survey. The results show some really good results. There are of course areas where we can look to improve especially where we received a below average score.

1

DEALING WITH CLIENT ENQUIRIES

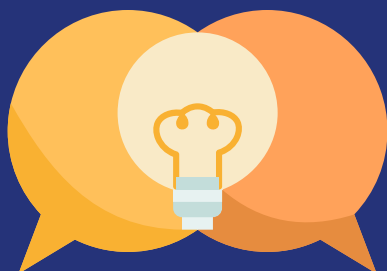


177 responded with 172 clients rating us above average. In fact 147 selected excellent with 25 stating the way we deal with their enquiries is good.

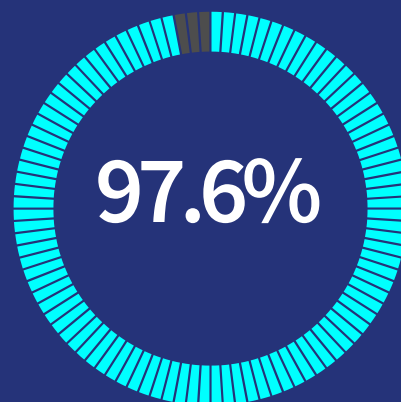


2

PROVIDING CLEAR ADVICE AND SUPPORT



168 clients responded. 164 said we provided excellent or good, jargon free, advice and support. 4 clients rated us average or below. This is good to know as we can look at ways to improve this for those clients in particular.

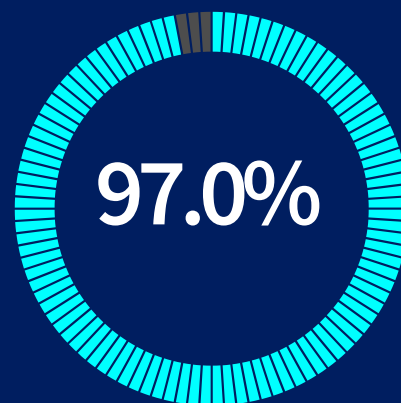


3

HAVING ACCESSIBLE STAFF



167 people responded to this question. Out of those, 162 people said that accessibility to our staff was excellent or good. 5 people ranked us average or below.





Are our clients satisfied?

04



96.6%

QUALITY OF OUR SERVICE

178 responded to this question with 172 of them stating their satisfaction was excellent or good. We had 6 clients who ranked our service as average or below on this question.

88.9%

VALUE FOR MONEY

Out of 171 responses to this question, 152 were above average rating value for money as excellent/good. This is great news, we love it when our clients really value the work we do for them. We did however have 18 clients citing value for money average or below.

We then went on to ask some questions about the services that clients use us for and how we rank on delivery. The following results show how many scored us for excellent or good service delivery.

AUDIT/ACCOUNTS



TAX



BUSINESS PLANNING



BUSINESS FINANCE



BOOKKEEPING/PAYROLL





Let's talk 05

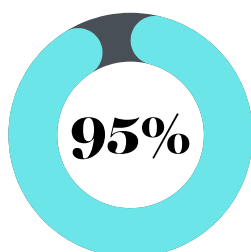
Communication is critical to ensure that we meet our clients needs. Therefore the following set of questions delves into how well we communicate with our clients and their communication preferences.



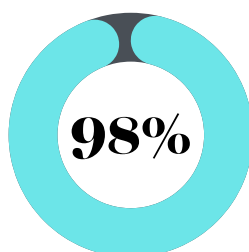
HOW DO CLIENTS RATE US FOR THE FOLLOWING COMMUNICATION TYPES

We asked clients how well we do with our communication with them. These results reflect the number of people who rated us good or excellent.

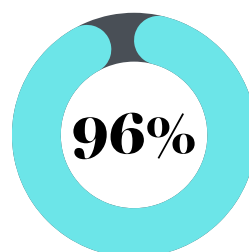
Letter



Telephone



Email



We then asked clients how they would prefer to receive news and notifications from us.

166 preferred email whilst 24 said post. 5 would rather not receive anything. Some people selected both post and email which are reflected in the figures above.





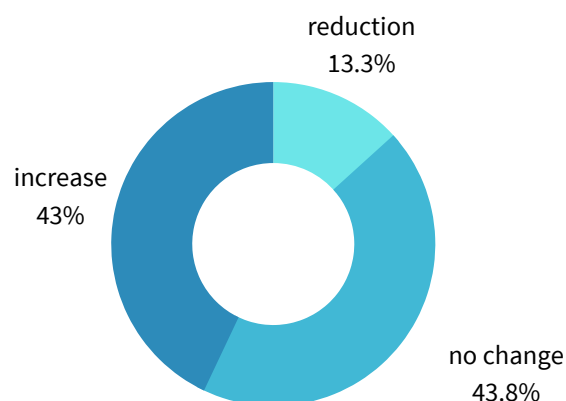
06 Business outlook

We wanted to find out what our clients outlook was for the next 12 months. This information helps us to ensure that we deliver advice, services and support that will help clients, particularly through uncertain economic times.

WHAT LEVEL OF INCOME ARE CLIENTS PROJECTING OVER THE NEXT 12 MONTHS?

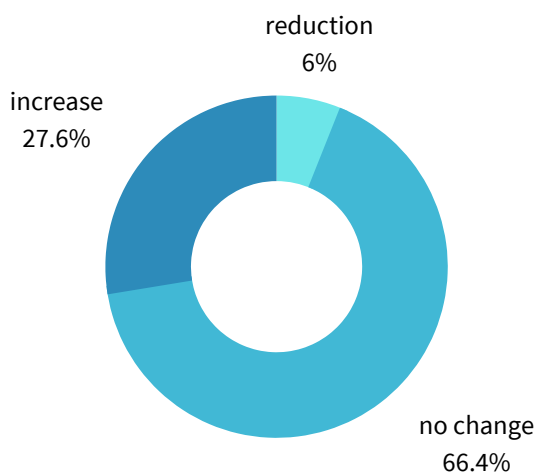
It is interesting to see that over 43% of businesses expect their income to increase.

This seems to be a very positive sentiment in current uncertain economic times.



WHAT CHANGES DO CLIENTS ENVISAGE WITH THEIR HEADCOUNT OVER THE NEXT 12 MONTHS?

Whilst 43% of clients anticipate their income will rise, only 27.6% of them anticipate an increase in headcount. 6% envisage reducing their headcount but 13.3% see income reducing.





Clients top priorities

07

We asked clients what their top priorities for the next 12 months are going to be. Here is a list of the top 10 showing the changes in position from last year. We have a joint top place this year with 56 clients stating that increasing profitability and looking after existing clients were top of their agenda.

1	INCREASE PROFITABILITY	<>
	LOOK AFTER EXISTING CLIENTS	↑4
3	GROWTH	↓2
4	FIND NEW CLIENTS	↑5
5	SURVIVAL	↓4
6	REDUCE OVERHEADS	↑9
7	SUCCESSION	↑10
8	INCREASE USE OF TECHNOLOGY	↓6
9	DEVELOP NEW PRODUCTS/SERVICES	↓7
10	EXPLOIT NICHE OPPORTUNITIES	↓8



Whilst we expected 'reduce overheads' to be higher on the agenda for many businesses, the surprise here is succession. Last year this was at the bottom of the list.

MAJOR CHANGES

When asked if they were planning any major changes over the next 12 months, whilst most stated they had nothing planned, **13 clients** plan to either buy, sell, merge or close their business.

CAN WE HELP?

We asked clients if there was anything else that we could help them with. The key services here were **Trusts (estate planning)**, **Tax Advice (planning efficiency/returns)**, **Personal Tax - IHT/CGT**.

With other clients looking at buying, selling or merging a business, there are plenty of opportunities to engage further with clients to support them.





What our client said 08

We asked clients what they thought of our services. Here are just some of the comments particularly where staff members were mentioned.

Joanne Walker is amazing!! I can ring her anytime and she treats me like a friend. She reassures me and makes everything OK.



Mike Hall has been on hand to offer training and support during a period of staffing issues. He has been invaluable over the past few months, going over and above to ensure the department can continue to function.

Caprice and the girls have been brilliant. Always looking at ways to support and always happy to answer any concerns/queries which we may have.



I found Ann, both helpful and informative. I felt confident knowing that my accounts were in good hands!

Matthew Hotham is very professional, knowledgeable and approachable and with the support of the FB team, no generic answers here. Thank you

Dyann has been amazing offering help at every query.

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