

What our clients think!



2023

Summary report from the
2023 annual client survey.

www.forrester-boyd.co.uk

Introduction

As we reach the end of the calendar year, we are delighted to summarise our annual client survey report. At Forrester Boyd, our team's dedication to excellence and continuous improvement is the cornerstone of our success.

This report encapsulates the voice of our clients, so thank you to all those who responded.



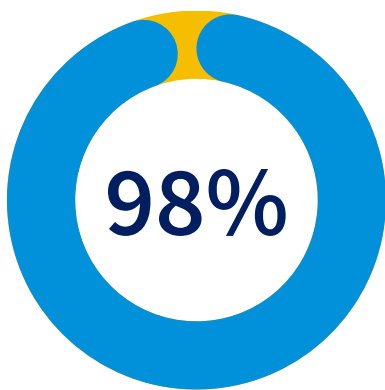
We understand that our greatest asset is our talented team. This is why our clients view is so important to us. It helps to understand not only how we are doing , but also allows us to build a roadmap for continuous improvement.

Over the coming pages you will see a full breakdown of how clients scored in us in areas such as support and advice, the efficiency of our communications, and the services we offer.

We hope you enjoy reading and thank you once again to those clients who took the time to respond to our survey.

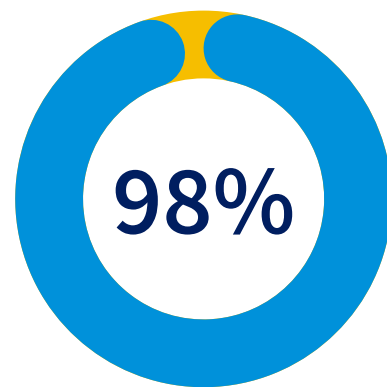
What you said about our services

We started our survey wanting to find out what you thought about the services that we currently offer you. This helps to give us a measure of success and look for areas where we might need to look at ways in which we can improve.



Dealing with enquiries

98% of clients believe we are good to excellent when it comes to dealing with enquiries.



Jargon free advice

98% of clients believe we offer clear and jargon free advice they can understand.

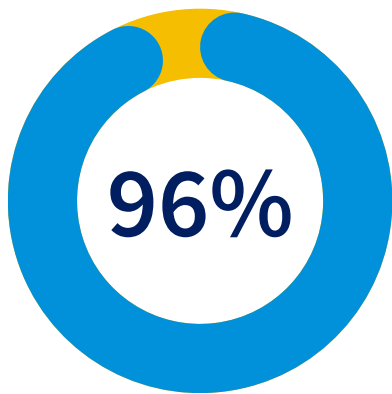
Achieving a 100% satisfaction rate is a challenging goal but continuous improvement is key so great to see an increase in our rating for dealing with client enquiries, a rise from 97% last year.

We have achieved an exceptional 98% satisfaction rate in providing jargon-free advice. This accomplishment underscores our commitment to clear communication, ensuring that clients can navigate complex financial matters with ease.



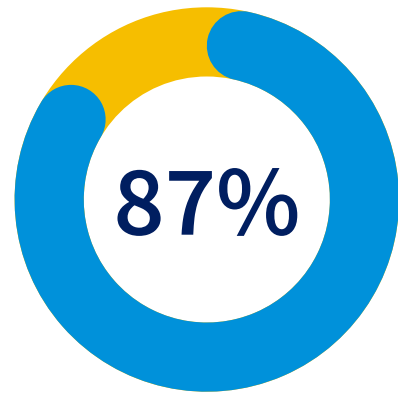
I have recommended Forrester Boyd to a number of friends on the basis of the excellent service I have experienced





Quality of our service

96% of our clients reported that the quality of our service was either good or excellent.



Value for money

87% of our clients believe we offer value for money when it comes to the service we offer.

“It is so easy doing business with Forrester Boyd! The service is professional yet friendly and the promptness of reply is the epitome of efficiency. We feel our business and personal tax affairs are in the safest and very capable hands.”

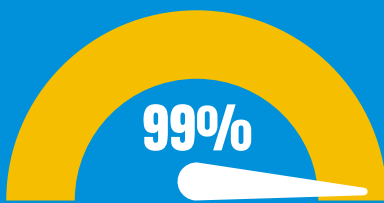
A solid 96% satisfaction rate reflects the high esteem in which clients hold the quality of our services. There is always room for improvement however, so we will continue to look at ways in which we can improve our services and also meet the expectations of our clients.

Whilst 87% of clients rate us good or excellent in terms of value for money, this does reflect the need for us to get closer to our clients, and to improve the perceived value of our service and expert advice that we offer.

We hope to see an improvement in these two areas next year as we continue to nurture our client relationships and ensure they feel the benefit and value of our service, knowledge and expert advice that we provide.

About our services in more detail

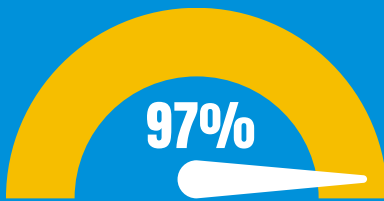
Our client survey reveals an outstanding performance across the spectrum of all our services. The accolades are well-deserved, in particular with our audit and accounts services scoring an impressive 99%, reflecting the precision and thoroughness we bring to financial scrutiny.



Audit/Accounts



Tax



Business Planning



Bookkeeping & Payroll



Business Finance



Other

Our tax services received a perfect 100% satisfaction rate, a testament to the proficiency and reliability clients associate with our tax expertise. Business planning achieved a commendable 97%, showcasing our commitment to strategic foresight and collaborative planning. Business finance, bookkeeping and payroll achieved 100%, highlighting our dedication to precision and reliability in these critical areas.

How well do we communicate?



100% said we offered good communication via email



99% said we offered good communication via phone



100% said we offered good communication via letter



100% said we offered good face-to-face communications



100% said we offered good communication via video

“
Having been with Forrester Boyd for over 30 years I have found their knowledge and help essential. The staff are all great to communicate with and always willing to go that extra mile.
”

“
It is nice to be able to telephone and get a normal human response
”

“
Friendly understanding staff always take time to explain things
”

“
30 years of excellent service!
”

About you and your business



We wanted to find out a little bit more about you and your business over the next 12 months. This helps us to interpret the type of support that clients might need and the challenges they are currently facing.

We asked clients what level of income they are projecting for their business over the next 12 months...

Increase



Decrease



44% of respondents stated they expected no change. These results closely mirror the 2022 survey results where 43% expected an increase and 13% expected a decrease.

We asked clients if they are expecting to increase or reduce headcount over the next 12 months...

Increase



Decrease



75% of respondents expected no change. There are some marked changes here from last year. Increases in headcount last year stood at 28% with 6% expecting a decrease whilst 66% expected no change.

By understanding these views, we can interpret the type of support that clients might need and the challenges they are currently facing. Whilst turnover is anticipated to remain in line with last year, the headcount figures present a different picture with more respondents anticipating no changes in their workforce. Does this represent more stability in staffing or less optimism in business growth?

Top Priorities

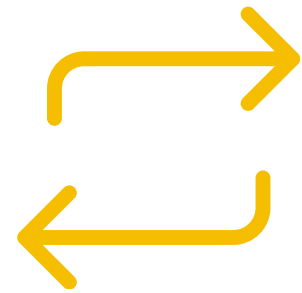
We then asked clients what their top priorities were for the next 12 months.



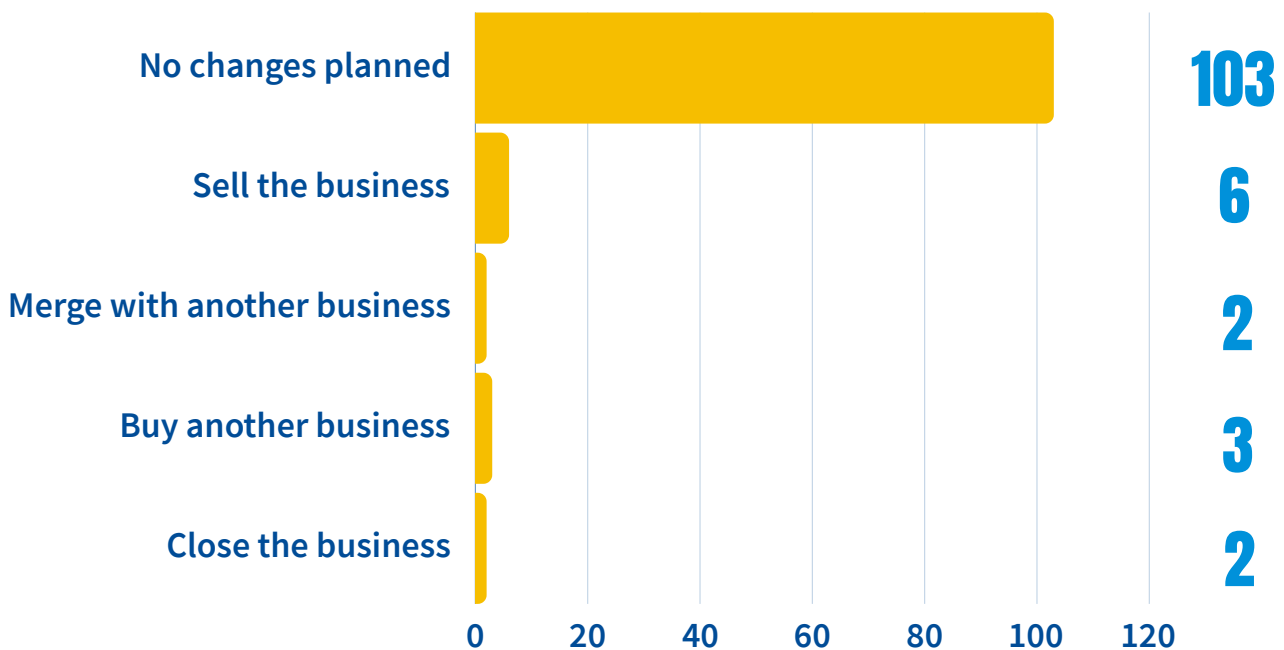
Increasing profitability and looking after existing clients remain the top priorities, a reflection of the results from last year. Growth however has dropped from 3rd last year to 5th and survival has become more of a concern.

This shows a strong reflection of the uncertain sentiment in the business community at the moment.

Major Changes



We asked clients if they are planning any major changes over the next 12 months, and if so, what is their main focus.



The results from this question are incredibly one-sided with many clients not planning any major changes within their business, however some clients are showing an interest in selling, merging, buying and closing, which reflects the anticipated rise in M&A activity in 2024.

How can we help?

We asked clients what other services they might require. This helps us to gauge how much help clients need, but also if there are services that we do not currently provide which clients might find helpful from us.

31

Accounts Preparation

28

Tax Advice

26

Personal Tax

16

Business Growth

9

Trust/Estate Planning

9

Succession Planning

7

VAT

5

Cloud Based Software Packages

5

Business Sales or Acquisition

4

Audit Services

4

Outsourcing

2

Company Restructure

2

Digital Accounting Software Training

2

HR Support

We are here to help. If you would like to know more about any of these services or help in other business matters, please do speak to your partner. Even if it is not something we offer as a service, we sure know lots of other businesses who we can recommend.

A Summary



Overall, clients who responded to our survey expressed outstanding satisfaction, as evidenced by an impressive 98% rating for our provision of jargon-free advice and a robust 98% satisfaction rating for the adept handling of client enquiries.

Delving into the specifics of our services, the results speak for themselves - they are excellent and reinforce the firms unwavering commitment to service excellence in these crucial areas with most scoring 100%.

Being close to our customers has never been more important than now. As can be seen from the responses in relation to business headcount and major changes, we feel that clients need us more now than ever. The role of the accountant has evolved becoming more of a business adviser and sounding board in general.

By continuously refining our services based on client feedback, we can elevate the overall client experience and strive towards achieving an even more exceptional satisfaction rate.

Finally, many clients have expressed a desire for advice and support in other services we offer. Armed with these insights, we are well-equipped to continue to tailor our services to meet specific client needs, demonstrating our commitment to clear communication, client satisfaction, and continuous improvement.

Our moto is 'where everybody counts'. Whether staff, clients or other business contacts, we aim to ensure that every single person feels valued and that the services we provide for our clients, meets their expectations and more importantly, their individual needs.

If there is any business service that you feel you need help with, do discuss it with us. With over 3,500 clients throughout Lincolnshire and the East Riding of Yorkshire, there are not many problems or issues that we cannot help you solve in one way or another.





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