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What Do Customers Really Think of You?

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By Deborah Daily, Co-Owner, Buckaroo Marketing/New Media,

Ask a business owner how her customers think about the services they receive or the products they use, and you'll hear comments like "they love us." But when a third party asks those customers the same question, the results can be eye-opening.

I recently shared the story about developing a customer profile for a professional services firm that was eager to grow but lacked useful marketing intelligence about the business it was already handling. We helped them take an objective look at all of their clients to get a sense of how well that work matched the firm's resources and revenue expectations.

Now that the firm had taken a look at the mirror, it was time to obtain some candid feedback by reaching out to their clients and discovering what they really thought of the firm. At first, some of the professionals resisted the idea, claiming they had already measured client satisfaction -- and they had, using a simple SurveyMonkey form that asked basic questions but provided little in the way of useful insight.

We told them they needed a deeper analysis and recommended a series of client interviews. The interviews would involve speaking directly to a cross-section of clients. They would be performed by our team with a promise of complete confidentiality. We wanted to hear the good, the bad, and the ugly, and knew that clients would open up more to a perceived third party than they would if their primary contact at the firm asked "How are we doing?"

The firm pulled together a long list of clients for us to speak with. We wanted plenty of names, because experience has taught us that a certain percentage won't want to talk, whether that's because they're too busy or are uncomfortable offering candid feedback. However, we wound up speaking to enough people to hear consistent themes.

We asked everyone the same questions, and used their responses as a way to drill down more deeply, whether that was to clarify a response or explore an issue that appeared to be important to the particular client. Vague answers wouldn't provide any benefit. For example,

when asked about what they needed from the firm, nearly everyone said the firm should respond to requests in a timely manner. Well, what's timely? Within the hour, the day, the week? The consensus was clearly that responding within 24 hours was important.

Interestingly, if a client mentioned a problem with the firm, it was usually shared in their answer to the first question. To us, that was a sign that the clients had wanted to share their dissatisfaction with someone but hadn't been given an opportunity. Many clients volunteered information beyond what we asked. We thought our conversation with one was nearing the end, and asked him if there was anything else he wanted to mention. Yes, as a matter of fact, there was. He talked so long that it took nine pages to transcribe his answer. This client who the firm assumed was thrilled with their services was actually furious.

We asked the clients about which of the firm's competitors they also used. When we shared one of those names, the leadership team said, "They're not a competitor of ours." We responded that the client clearly views them as a competitor, because they see them as the go-to firm, and you as their second choice. The clients were only too happy to share why they liked those competitors, and the reasons were usually perceived shortcomings in the way the firm handled their business.

There were also surprising examples of how the firm managed to shoot itself in the foot. One client mentioned that during a meeting with a project team, he had expressed a desire that the firm step up its client service. One of the firm's professionals responded, "Well, if you would do more business with us, we'd take better care of you." That may have been true, but it's not something that should be verbalized, and it stunned the client. Clearly, the professional staff needed some basic customer service training.

We summarized the results and provided complete transcriptions of the client comments in a 135-page binder. Instead of providing a vague assessment, we were able to tell them exactly what their clients thought, backed by verbatim comments. That unvarnished truth may not have been easy to digest, but it gave them plenty of food for thought.

Deborah Daily is co-owner of Buckaroo Marketing | New Media.

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Grow INdiana Media Ventures, LLC
 Inside INdiana Business With Gerry Dick
 1630 North Meridian Street
 Suite 400
 Indianapolis, IN 46202
 PHONE: (317)275-2010
 FAX: (317)472-7355
 NEWSLETTER@GROWINDIANA.NET

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