



Client Surveys
An Introduction

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As Peter Drucker, the father of management consultancy, said, 'My greatest strength as a consultant is to be ignorant and ask a few questions.' Asking your clients the right questions is the key to understanding how they really perceive your agency, and then improving your client relationships. Stronger client relationships lead to increased client retention, more work and faster agency growth. Up to the Light has spent years perfecting these questions and conducting Client Surveys for many agencies, from large to small and across every discipline. Clients tend to tell us things that they wouldn't say to you and voice their thoughts more forcibly. This document explains the many benefits of an independent Client Survey and outlines our approach.



Our Client Surveys

The principal benefits of an independent Client Survey:

- Reveal current perceptions of your strengths and weaknesses.
- Understand which boxes clients are putting you in, whether fairly or unfairly.
- Provide a better understanding of client needs and concerns.
- Identify any new business development opportunities.
- Highlight client service measures that can improve the relationship.
- Spot any problems early.
- Understand how you are compared to competitor agencies.
- Provide an assessment of client perceptions across areas such as value for money, ability to add value, proactivity, effective listening and commercial awareness.
- Understand how clients see the market more generally – trends and concerns.

However, perhaps the biggest benefit of a Client Survey is that it provides ‘from the horse’s mouth’ evidence. Important business decisions can sometimes be taken on little more than a hunch or suspicion, whereas a Client Survey can give those decisions a much firmer foundation.

The principal benefits of an Up to the Light Client Survey:

- Over the years we have developed an unrivalled set of core questions. These are then refined so that question sets are always bespoke, not generic. They are developed following conversations with you about your particular clients and issues. Huge effort goes into developing question sets that are highly effective at probing issues and eliciting the most valuable and useful information.
- Interviews are both qualitative and quantitative. There will be rich feedback in terms of client views, feelings and perceptions. However, there will also be scores and statistics generated so that the agency’s ‘performance’ can be meaningfully assessed and then monitored over time.
- The fact that we have a brands and marketing background means that we understand market research. We provide a ‘hard edge’ debrief presentation, not just verbatim feedback.
- Our presentations pinpoint the most consistent issues and offer practical recommendations as to how client relationships can be strengthened.

The annual Client Survey conducted by Up to the Light is a very effective way of gauging client perceptions. The independent nature of this exercise, together with Jonathan’s experience at conducting these interviews, ensures that we get valuable insights. As well as providing informative feedback, he is particularly good at seeing across the interviews and relating them to our overall business.

David Wright
Marketing Director
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Our Client Surveys typically probe the following types of area:

- Your perceived strengths
- Your perceived weaknesses
- How you rate versus competitors
- Any perceived gaps in your services
- Personal chemistry
- Accessibility of key people
- Effective listening
- Understanding the market and commercial realities
- Meeting deadlines
- Costs versus competitors
- Value for money
- Reactivity versus proactivity
- Client development opportunities
- Quality of creativity
- Quality of strategic advice
- Ability to add value
- Views on your website
- Views on your communications
- Personality of the agency
- Main expectations of the agency and whether these are being met
- Test the viability of any new services or initiatives that you may be planning

Up to the Light's independent interviews have helped to reveal clients' real views and concerns, giving important pointers as to how we can fine tune our approach.

I can thoroughly recommend their expertise at extracting client issues and drawing conclusions that lead to practical benefits for our business.

Richard Carpenter
Managing Partner
MerchantCantos

All our Client Surveys build on our core question set to create a bespoke questionnaire that is right for you and your clients. We take the time to meet you before the Client Survey to discuss the clients, your particular issues and then refine and agree the question set accordingly.

As well as feeding back each individual interview, we will present an Executive Summary that highlights consistent issues and gives clear recommendations for immediate, short term and long term actions. Ultimately, how you use the Client Survey will determine its true value. At its best, the Client Survey can become an integral part of your business planning and

Up to the Light can assist in making this a reality.

Methodology

Define

- Select clients to be interviewed.
- Meet Up to the Light to discuss the selected clients and the issues to be covered in the question set.
- Agree objectives of the Client Survey and agree the final question set

Consult

- Send interview requests to clients.
- Once permissions have been given, Up to the Light will make contact with clients directly and diarise interviews.
- Conduct all the interviews.

Up to the Light's Client Survey was a really valuable exercise conducted in a professional and sensitive way. The interview style and question set was excellent at extracting the richest, most useful feedback.

Claire Callaway
Managing Director
Checkland
Kindleysides

Deliver

- Up to the Light will prepare a presentation with feedback for each interview and an Executive Summary that highlights consistent issues and give recommendations.
- Full feedback presentation and recommendations.

Up to the Light offers experienced, expert and bespoke advice for professional services firms and marketing services agencies



About Up to the Light and our approach

The consultancy offers experienced, expert and bespoke advice for marketing services agencies and professional services firms. Our services include:

- Client surveys
- Lost pitch/tender interviews
- Defining competitive point of difference
- Business development strategy
- Training and workshops
- Brand strategy

Our brands marketing background is of great benefit when conducting Client Surveys. It allows us to see client interviews in the wider perspective of your agency's reputation and relationship to competitors. Additionally, our understanding of market research ensures that we provide robust methodology, feedback and recommendations.

Our very first client interviews were conducted with a view to helping an agency define its point of competitive difference. What better way to start than by interviewing selected clients? Over the years our approach became more sophisticated. We developed a core question set that was more effective at eliciting richer information, with both qualitative and quantitative sections. We then started to be commissioned by leading advertising and branding agencies to annually monitor the health of their high value relationships. Many of these are multi million pound global client/agency relationships. This led to Client Surveys for law and accountancy firms.

Today, Up to the light conducts many hundreds of client interviews each year. These are with a full range of client type from global to national and regional, from Chief Executive to Board Directors and middle management. Over the last ten years we have seen a growth in Client Surveys fuelled by increasing competition and a desire to get closer to client needs. Arguably, the biggest variable between agencies lies not in levels of creativity but in the quality of their business relationships. Monitoring these relationships and understanding how they can be strengthened is the key to client retention and development.

We gained invaluable insights and understood the positives and inconsistencies in our approach. The feedback presentation was unbiased, concise and easy to use, making it easy to feed back to the business. This was a thoroughly worthwhile exercise and the insights have been built into our business planning for next year. We will now continue to undertake client reviews on an annual basis.'

**Jim Thompson,
Managing Director,
20/20**

Key people

Jonathan Kirk

Jonathan is the founder of Up to the Light. He has senior, first hand business to business experience. He is a former Director of Fitch, the global branding group, and of EHS Brann, one of Europe's largest direct marketing agencies.

Jonathan brings over twenty years top flight experience.

Jonathan advises a wide range of marketing services agencies and professional services firms regarding all aspects of business growth. Importantly, Jonathan frequently partners with agencies to provide brand positioning and brand strategy for end clients. So many consultants become theorists and teachers, slightly removed from reality, but Jonathan is continually involved at the sharp end presenting, pitching and delivering high profile strategic work for major brands. This is of huge benefit to all his clients.

He is a regular conference speaker and trade press contributor, and is also a member of the Design Business Association's Experts Register.

Adrian Dent

After graduating from Cambridge University, Adrian began his career in advertising, working for agencies including Grey and Delaney Fletcher. He was responsible for planning the highly successful launch of Mars Ice Creams across Europe during a two-year stint in Paris, helped launch Chrysler Jeep into the UK and was part of the team which came up with the idea for Macleans Milk Teeth.

He also gained experience on the client side, managing a multi-million pound advertising budget for Manweb, before establishing himself as a strategic marketing consultant in 1996.

Since then, Adrian has helped a wide variety of organisations with all different types of branding and marketing challenges. Research is an integral part of Adrian's work and he is highly experienced in conducting research to unlock key strategic issues.

Fenella McCarthy

Fenella is a highly experienced brand consultant. An Oxford graduate, she is a strategic thinker who believes in providing creative, practical and focused solutions to meet her clients' needs.

Her previous roles have included Deputy Head of Research for Mintel and Planning Director roles at London agencies.

As well as brand positioning and brand strategy, Fenella has strong market research experience. Indeed, she started her career as a qualitative researcher and is a full member of the MRS.

Green Room's Client Survey conducted by Up to the Light was a thoroughly professional and rigorous exercise. The quality of questions, both qualitative and quantitative, meant that we were able to extract the information we needed. Up to the Light's conclusions and recommendations were intelligent, insightful and well presented. The whole exercise has helped inform our business direction and I would thoroughly recommend it to other businesses as an annual part of their approach.'

Richard Ash, Founder & Chief Executive, Green Room

Clients Up to the Light has interviewed include:

Abbott	Constellation Europe	IBIS Biosciences	Musgrave Group	Superdrug
ABN AMRO	Converse	IMG	Nationwide	Surrey County Council
Adidas	Cushman & Wakefield	Inivista	NatWest	Swatch Group
AEG	Davidoff	Innocent	NEC	Tesco
Ahold	De Poste	Institution of Mechanical Engineers	New Look	Teva
Al Maya Group	Debenhams	Interfacefloor Europe	Next	The Benfield Group
Allergan	Diageo	Iris Group	NHS	The British Retail Consortium
Alpha Group Plc	Diesel	Isis Pharmaceuticals	NHS Foundation Trust	The Lubrizol Corporation
Amica Law	Digital UK	Janssen Pharmaceuticals	Nike	The National Gallery
Anglo American	Dixons Retail	Jigsaw	Nisa	The National Trust
Ardene	Dorothy Perkins	JLT Group	NorgesGruppen	The Salvation Army
Argent Group	DuPont Teijin	John Lewis	Notcutts Garden Centres	Timberland
Argos	Durkan Group	Johnson & Johnson	Notting Hill Housing Association	Tomkins
Asda	eBay	Jones Bootmaker	Novartis	Topshop
Association of Publishing Agencies	Electronic Arts	Jones Lang Lasalle	Nu Skin	Travis Perkins
Aurora Fashions	Element Six	Jordans Cereals	Oakley	Tristar
B&Q	ERP UK	Joules	Oasis	TSB
Bacardi	Eurasian Natural Resources Company	KappAhl	Ofcom	Turner Entertainment
BAFTA	Euromoney	Kellogg's	Olympus	Twinings
Bank of England	Europa Capital	Knight Frank	One Stop	Tyne & Wear Museums
Barclaycard	European Land	Ladbrokes	Oracle Corporation	UBS
Barclays	Experian	Lakeland	Orange	UK Trade & Investment
BBC	Filtrona	Land Securities	Orsay	Umbro
Belron	First Quantum Minerals	Levi's	Palmer & Harvey	Uni Credit
BIPA	Foley & Lardner	Life Technologies	P&G	Unilever
Blackberry	Footlocker	Lipsy	Pizza Hut	University College London
Blackstone Group	Forever 21	Lloyds Pharmacy	Philips	University of Bedfordshire
Boehringer Ingelheim	Fred Perry	London 2012	Polaroid	University of Westminster
Boots	Freeview	Luxottica	Primark	Vauxhall
Boston Scientific	Fujifilm	Madame Tussauds	Raytheon	Ventac Partners
Boux Avenue	Gallaher	Magnomatics	RBS	Verinata Health
Bowers & Wilkins	Gates Corporation	Manchester City Galleries	Reed Exhibitions	VF Corporation
Breast Cancer Care	Glasgow Housing Association	Marie Stopes	Reitmans	Visa
Bristows	Association	Marks & Spencer	Reenas Electronics	Vodafone
BT	Grosvenor Estates	Mars	Republic Technologies	Waitrose
BUPA	Guys & St Thomas'	Matalan	Rolex	WH Smith
Burger King	Hammersons	Maxeda	Sainsbury's	Wickes
Burton	Henkel	Mecca	Securistyle	Wisdom
Busaba Eathai	Henri Lloyd	Mercedes-Benz	Sequel	York Museums Trust
Butlins	Highland Spring	Met Office	Skechers	and many more...
Cala Homes	Hines	Microsoft	Smiths Group	
Calvin Klein	Holland & Barrett	Monsoon	Sonae	
Cardiff University	Homebase	Moss Bros	Spar	
Christian Louboutin	HSBC	Mothercare	Spire Healthcare	
Citifinancial	HTC	Mr Price Group	Steptoe	
Codexis	Hubrecht Institute		Storeys:ssp	