



Client Listening

Getting closer to your clients

An introduction to our approach

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'We value the collaborative approach Jonathan takes to working with us. The client listening interviews Jonathan undertakes provide an invaluable, independent perspective on our performance and on what our clients expect of us. Jonathan takes the time to understand our firm, our work and our clients and this deep knowledge enables him to have informed and engaged conversations with our clients and provide detailed and insightful feedback.'



GUY HIMSWORTH

CHIEF OPERATING OFFICER, CARPMAELS & RANSFORD
(LEADING EUROPEAN INTELLECTUAL PROPERTY FIRM)



01 INTRODUCTION



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Introduction

Listening to clients and developing a better understanding of their needs is an important platform for business improvement. In reality, however, human nature entails that most firms find it easier to accept clients' praise than ask for constructive criticism.

Up to the Light is the leading provider of client surveys to UK agencies and professional services firms. We ask your clients the tough questions from an independent perspective and report back with a rigorous and objective research debrief. For over ten years we have been perfecting the questions that extract the richest client feedback, conducting client surveys for many organisations, from large to small and across every field.

Given that we conduct over 700 client interviews on behalf of professional services firms each year, we are able to compare your client feedback with industry benchmarks and give a real sense of perspective. This document looks at the benefits of an Up to the Light client survey and the process involved.

'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, Dalziel & Pow
(Leading branding agency)

02 ACTIONABLE EVIDENCE



Actionable evidence

All our client surveys are based on interviews, either virtually or in person. We've found that online surveys fail to give anywhere near the richness of real interviews. Clients also tend to see online questionnaires as a chore.

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. Much of this richness comes not just from the question set but in the ability of our interviewers to probe and explore. This is about knowing when to say, 'Can you give me an example of that?' or 'What would make the difference?' or 'Is there anything you'd be doing if you were in their position?' There will also be scores and statistics generated so that the firm's 'performance' can be meaningfully assessed and then monitored over time. These are compared to industry averages.

We provide a 'hard edge' debrief presentation, not just verbatim feedback. Our presentations pinpoint the most consistent issues and offer practical recommendations.

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 firms lies not so much in the quality of their work 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.

'This year is our 4th Client Survey in a row and the data has become an integral part of setting our priorities. Whilst the purpose was primarily to get an honest read from our clients as to how we are perceived by them, a hugely beneficial by product has been when clients nudge us to move into certain new areas of opportunity. The process has helped us be better consultants through using the constructive feedback to co-conspire more effectively with our clients.'

Trevor O'Reilly

Partner, PA Consulting
(Global management consultancy)

Areas that we explore

Our interviews typically explore:

- Your perceived strengths and weaknesses
- Any perceived gaps or question marks about your services
- How you rate versus competitors
- Personal chemistry
- Accessibility and responsiveness of key people
- Effective listening
- Understanding the client and their commercial realities
- Meeting timelines and budgets
- Value for money
- Costs versus competitors
- Reactivity versus proactivity
- Client development opportunities
- Client challenges, what's on the horizon, implications for the firm
- Quality of legal advice
- Quality of client service
- Quality of strategic advice
- Ability to add value
- Views on your website, communications and social media
- Future needs and how the relationship can evolve
- Main expectations of the firm and how far these are being met

As well as sharing each individual interview with you, we pull our findings into a comprehensive executive summary. This highlights quick wins, medium term actions and longer-term considerations.

'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, Brunswick Group
(Global financial advisory firm)

Deliverables

- **Each interview is written up in a consistent format**
 - Perceived strengths
 - Qualities they most value
 - Perceived weaknesses/areas for improvement
 - Their key challenges
 - Future – how the relationship might evolve and how the firm could add more value
 - Comparisons with competitors
 - Main expectations of the firm and to what extent these are being met
 - Perceptions of fees and value for money
 - Scores across different categories such as quality of legal knowledge & advice, quality of strategic commercial knowledge & advice, level of technical knowledge, collaboration, quality of client service, as a firm overall
 - Their one piece of advice for the firm
 - Conclusions and summary of the main issues
- **Executive summary**
 - Scores across all interviews and comparisons with benchmark average scores across 700+ client interviews that we conduct each year
 - Results of key 'barometer questions' and comparisons with benchmark average scores
 - Highlight main consistent strengths across all interviews
 - Highlight main consistent weaknesses and areas for improvement across all interviews
 - Conclusions regarding value for money, comparisons with competitors, clients' future needs
 - Recommendations for next steps

'Up to the Light's ability to get clients to open up and be totally honest about their relationship is impressive, and the way they communicate this information back to you is eye-opening, to say the least. We found the feedback incredibly valuable and led to significant internal change and wide-ranging client service improvements. Real, unbiased and direct feedback from your clients – it's gold dust!'

Gideon Wilkinson

Co-Founder & Managing Director,
Endpoint (Wayfinding & built
environment agency)

03 OPTIONS



There are 3 main options:

01

Spot Interviews

Selected interviews with one or more key clients (under 10 interviews). These can be used to monitor specific high value client relationships.

02

Pilot Survey

10 interviews can be used as a pilot before moving to a client survey. At 10 interviews we can begin to draw some meaningful conclusions across a client base. We can begin to differentiate between consistent issues and client specific ones.

03

Client Survey

These are client surveys covering from 11 interviews up to 60 and more. They are full client relationship audits that can be used as an annual platform for improvements and new initiatives.

Whether **Spot Interviews**, a **Pilot Survey** or a **Client Survey**, the essential process is the same:

01

Define

Select clients to be interviewed. Meet Up to the Light to discuss the client backgrounds and the issues to be covered in the question set. Agree objectives and agree the final question set.

02

Consult

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

03

Deliver

Up to the Light will prepare a full debrief presentation with feedback for each interview and an executive summary that highlights consistent issues and gives recommendations.



'Made Tech works closely with Up To The Light to better understand the relationships we have with our clients. Their interview-based approach gives us clear data to measure performance over time. This helps us spot opportunities and take actions quickly. Having Up To The Light as an independent partner adds value, as clients share perspectives with them that they might not share with us directly. Jonathan's detailed analysis digs deep into the real issues.'

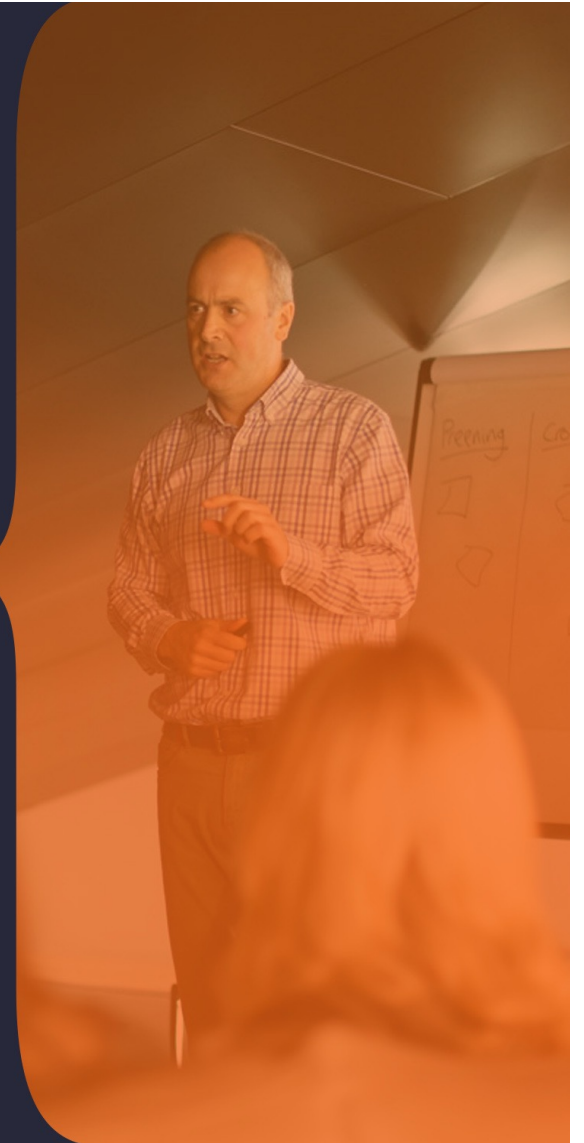


SAM PAICE

HEAD OF OPERATIONS, MADE TECH PLC
(DIGITAL, DATA & TECHNOLOGY SERVICES FOR UK GOVERNMENT)



04 WHAT ARE THE BENEFITS?



Benefits of an independent Client Survey

- **Unbiased, 'from the horse's mouth' evidence**
 - **The Client Survey is a catalyst for action.** Instead of debate going round within the firm, you can say, 'Look at the Client Survey – we know what our clients are saying so we need to take the following steps.'
- **Develop better client development plans**
 - **The Client Survey can reveal areas for improvement.** Some examples might include: Opportunities to be more proactive and develop stronger partnerships, levels of responsiveness, opportunities to plug gaps in clients' knowledge of your services and relevant experience, fine tune administrative and billing issues, opportunities to change team structures to better suit client needs, opportunities to improve aspects of client service, opportunities to improve knowledge of the firm over and above relationships with key individuals. Knowledge of client's real views will allow you to develop targeted and relevant plans to address the issues.
- **Spot opportunities**
 - **Our Client Surveys can help firms to make positive changes in direction.** A Client Survey can help inform the launch of a new service, stimulate a change in branding and messaging, improve the quality and relevance of the firm's added value communications in blogs, publications and events.
- **Helps to unite the firm**
 - Client relationships within law firms can be closely guarded. Different partners can have different approaches, and it can be challenging for a firm to act in consistent ways. An independent Client Survey is **an opportunity to look across different clients and practice areas, and address issues in a joined-up way.**
- **Keep improving**
 - **Improvement is not possible unless quantified.** Annual Client Surveys allow you to benchmark and measure improvements.
- **Kudos with clients**
 - **Clients are generally impressed** that the firm is consulting them in this way. It is a tangible sign that the firm really values the relationship and is investing in it.

'We knew we were in expert hands. Up to the Light took time to understand our clients before interviewing them and reassured us that the questions they would be asking our clients were pertinent and probing. The result was more than simple client feedback. It was a detailed research debrief presentation which has been incredibly useful in helping us to understand client needs and continue to improve our approach.'

Tracey Westgate

Client Services Director, Luminous
(Leading communications agency)

Financial

Abbey Autoline
 ABN AMRO
 Acon Investments
 AIB
 Aldermore
 Alpha Group Plc
 Bank of England
 Barclaycard
 Barclays
 BAWAG B.S.K.
 Benfield Group
 Blackstone Group
 CitiFinancial
 Collier Capital
 Columbia Threadneedle Investments
 CYBG
 DBS Bank
 Euromoney
 Experian
 Goshawk Asset Management
 HSBC
 IIGCC
 Impax Asset Management
 Investec
 Invest Europe
 Lloyds Banking Group
 Lloyd's of London
 LSEG
 Nationwide
 NatWest
 Novia Financial
 Oakley Capital
 Octaura
 Phoenix Group
 Prima Insurance
 Prudential
 Raiffeisen Bank
 RBS
 Rockpool Investments
 SS&C Intralinks
 TSB
 UBS
 United Overseas Bank
 Visa

Professional services

Amica Law
 Arup
 BakerHostetler
 Bozicevic, Field & Francis
 Bristows
 Durkan Group
 EY
 Fenwick & West
 IMG
 Informa
 Intertek
 JTC Group
 Lando & Anastasi
 Linklaters
 McKinsey
 McNeill Baur
 Morrison Foerster
 RDJ
 Sage
 Sheppard Mullin
 Steptoe
 Sterne Kessler
 Tomkins
 Troutman Pepper Locke
 Wicker Park Group
 Wilson Sonsini
 Wolf Greenfield

FMCG & Household

Addis
 Argent Group
 Bacardi
 Barilla
 Bord Bia
 BWG
 C&C Group
 Carlsberg
 Cereal Partners Worldwide
 Coca-Cola
 Constellation Europe
 Dale Farm
 Danone
 Davidoff
 Diageo

Fever Tree
 Glenisk
 Highland Spring
 Imperial Tobacco
 Innocent
 Japan Tobacco International
 Jordans Cereals
 Kerry Foods
 Kimberly-Clark
 Mars
 Molson Coors
 Nestle
 Niu Skin
 P&G
 Palmer & Harvey
 Philip Morris
 Philips
 Pukka Herbs
 Twinings
 Unilever
 Versuni
 Weetabix
 Wisdom

Property

Berkeley Group
 British Land
 Cala Homes
 CLS Holdings
 Crown Estate
 Cushman & Wakefield
 Europa Capital
 Galliford Try
 Graham
 Grosvenor Estates
 Hammerson
 Hamptons
 Hines
 Intu
 Jones Lang LaSalle
 Knight Frank
 Land Securities
 McLaughlin & Harvey
 Mears Group
 Morgan Sindall

Retail

Adidas
 Ahold
 Aldi
 Al Maya Group
 Amazon
 Ardene
 Argos
 Asda
 B&Q
 Boots
 Boux Avenue
 Burton
 Calvin Klein
 Christian Laboutin
 Converse
 Curry's
 Diesel
 Dunhill
 eBay
 Enterprise Rent-A-Car
 Footlocker
 Forever 21
 Fred Perry
 Henri-Lloyd
 Homebase
 James Retail
 Jigsaw
 John Lewis
 Jones Bootmaker
 Joules
 Kappahl
 Ladbroke's
 Lakeland
 Levi's
 Lipsy London
 Loaf
 Luxottica
 Marks & Spencer
 Matalan
 Maxeda
 Maxol Group
 Mery
 Monica Vinader
 Monsoon

Moss Bros
 Mothercare
 Mr Price Group
 Musgrave Group
 New Look
 Next
 Nike
 Nisa
 Notcutts Garden Centres
 Oakley
 Oasis
 Ocado
 One Stop
 Orsay
 Paddy Power
 Primark
 Reitmans
 Rolex
 Sainsbury's
 Skechers
 Spar
 Superdrug
 Swatch Group
 Tesco
 The Body Shop
 The White Company
 Timberland
 Travis Perkins
 Umbro
 VF Corporation
 Waitrose
 WH Smith
 Wickes

Manufacturing

AEG
 Anglo American
 Aurobay
 BASF
 Breedon Group
 Chevron
 Delmec
 Dormakaba Group
 Echion Technologies
 Element Six

Eurasian Resources Group
 Filtrona
 First Quantum Minerals
 Garrett Motion
 Gates Corporation
 Genus
 Henkel
 Hutchison
 INEOS
 Interface Flooring
 Invista
 Klockner Pentaplast
 Magnomatics
 Nexxon
 Olam Agri
 Polaroid
 Renesas Electronics
 Republic Technologies
 Rondo Energy
 RTX Corporation
 Securistyle
 Shell
 Signify
 Smiths Group
 Solvay
 Spirax Sarco
 Sun Chemical
 Syngenta
 The Lubrizol Corporation
 Tri-star
 Trivium
 Vesuvius

Automotive

Aston Martin
 Belron
 BMW
 Honda Europe
 IMI
 Mahindra Group
 Mercedes-Benz
 Michelin
 Vauxhall

Not for profit

Breast Cancer Care
 British Army
 CAFRE
 Cardiff University
 Consumer Council
 CSIRO
 Department for Business and Trade
 Department for Digital, Culture, Media & Sport
 DVLA
 GDS
 Glasgow Housing Association
 Guys & St Thomas'
 Historic Royal Palaces
 Home Office
 International Olympic Committee
 London Fire Brigade
 Maritime and Coastguard Agency
 Met Office
 Ministry of Defence
 Ministry of Housing, Communities & Local Government
 Ministry of Justice
 NHS England
 Ofcom
 Ofgem
 Queen's University
 Skills for Care
 The National Trust
 The Royal Navy
 The Salvation Army
 Tusla
 UNESCO
 UNHCR
 UNICEF
 University College London
 University of Bedfordshire
 University of Westminster
 University of West of England
 University of York
 Versus Arthritis
 WWF
 York Museums Trust
 YouGov

Travel & Tourism

Belleair Holidays
 Bristol Airport
 Butlins
 Carnival Cruises
 Dublin Bus
 Failte Ireland
 Great Rail Journeys
 Leger Holidays
 Madame Tussauds
 Olympic Holidays
 Original Travel
 Saga
 Titan Travel

Tech

ADT
 Airtel Africa
 Arcus Global
 Atlantic Technologies
 Beyerdynamic
 Blue Prism
 Bowers & Wilkins
 BT
 Cricut
 Dell
 Edgescan
 Fujifilm
 giffgaff
 HTC
 Iris Group
 Logitech
 Marex
 Microsoft
 NEC
 Openet
 Oracle Corporation
 Orange
 Orgvue
 Samsung
 Sequel Group
 Vodafone
 Xiatech

Healthcare & Pharma

Abbott
 Allergan
 Atlas Genetics
 Boehringer Ingelheim
 Boston Scientific BUPA
 CliniMed
 Codexis
 Convatec Group
 Cosmed
 DePuy Synthes
 Gilead Sciences
 Guardant Health
 HUB Organoids
 Hubrecht Institute
 Ibis Biosciences
 Incyte
 Ionic Pharmaceuticals
 Johnson & Johnson
 KalVista
 Life Technologies
 Lloyds Pharmacy
 Mallinckrodt
 Merck
 Monte Rosa
 Novartis
 Novocure
 Olympus
 Regeneron
 Sanofi
 SingHealth
 Spire Healthcare
 Takeda
 Teleflex
 Teva Pharmaceuticals
 Ventac Partners
 Vertex Pharmaceuticals

Entertainment & Arts

BAFTA
 BBC
 Disney
 Electronic Arts
 Estate of Michael Jackson
 Flutter

Freeview
 Ladbrokes
 Mecca Bingo
 Netflix
 Penguin Random House
 Riot Games
 Royal Opera House
 The National Gallery
 TikTok
 Turner Entertainment
 Wanda
 Warner Bros

Hospitality

Burger King
 Busaba Eathai
 KFC
 Pizza Hut
 PPHE Hotel Group
 Starbucks
 Whitbread

Utilities

EIT InnoEnergy
 Energia
 Envia
 National Grid
 Severn Trent

Other

Bear Grylls Ventures
 Berlitz
 Biffa
 EIT InnoEnergy
 Energia
 ExCeL
 Hyve Group
 Landbell Group
 Reach PLC
 Reed Exhibitions
 Rentokil Initial
 Royal Mail
 Trustpilot
 Yodel

05 ABOUT US



About Up to the Light

The consultancy offers experienced, expert and bespoke advice for professional services firms and marketing services agencies. We challenge ingrained assumptions and offer more effective, insight-led advice.

Our services include:

- **Client surveys**
- **Business development strategy**
- **Pitching advice and post-pitch client interviews**
- **Training and workshops**
- **Business differentiation**
- **Miscellaneous business issues**

Our very first client interviews were conducted with a view to helping a firm to 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 highly effective at eliciting richer information, with both qualitative and quantitative sections. We then started to be commissioned by large firms to annually monitor the health of their high value relationships. Many of these are multi million-pound global client relationships.

Today, Up to the light conducts many hundreds of client interviews each year. These are with a full range of client type and span the globe.

Jonathan Kirk

Jonathan Kirk is the founder of Up to the Light and advises a significant proportion of the UK's top 100 agencies across a wide range of issues concerned with business growth and improvement.

As well as advising agencies, Up to the Light is also a brand consultancy that provides brand positioning and strategy for 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 brands. This is of huge benefit to his clients.

His 30-year career has included senior positions as a Director of agencies within both the WPP and Havas global networks. Before founding Up to the Light, he was a Director of Fitch, the global branding group (now Landor). He is a regular trade press contributor and conference speaker, delivering speeches, workshops and seminars for organisations including the Design Business Association, British Institute of Interior Design, Agency Hackers, the Institute of Advertising Practitioners in Ireland (IAPI), Design Skillnet (Ireland) and HURA (The Croatian Association of Communications Agencies). He is a founder member of the DBA's Experts Register.

As the author of the influential 'What Clients Think' report, published annually, he is a widely acknowledged authority on business-to-business relationships.



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



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