



Client Surveys

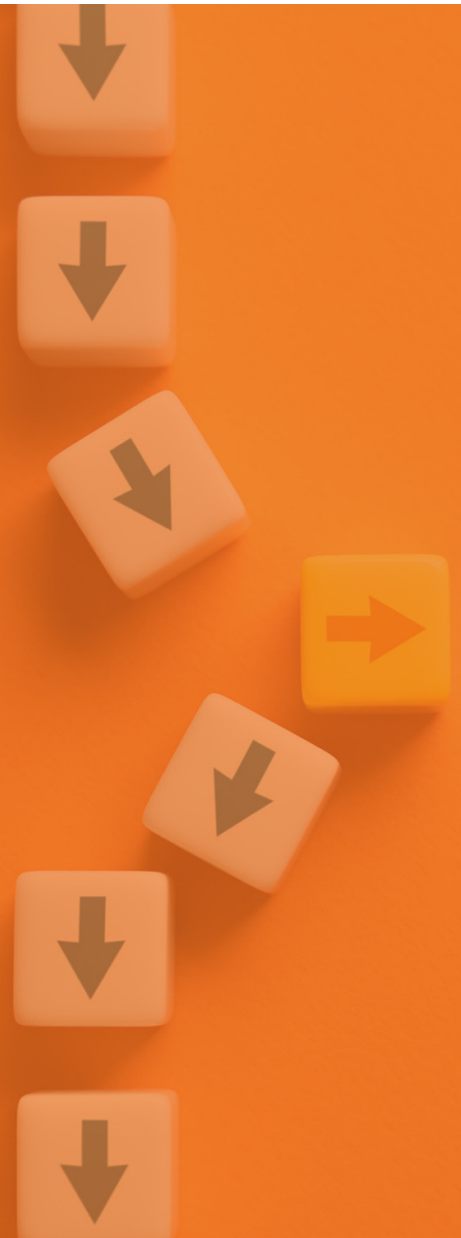
Getting closer to your clients

An introduction to our approach

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01 INTRODUCTION



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 companies 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, and publisher of the annual 'What Clients Think' report. 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 across a wide range of high value business to business relationships.

Given that we conduct over 700 client interviews 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

Actionable evidence

The main benefit of a client survey is that it provides from the horse's mouth evidence. You are able to cut through the internal agency debate and say, 'We know that this is what our clients think. Let's act on it.' Many of our clients use their annual client survey as a platform to launch new initiatives and make tangible changes. It serves as a powerful catalyst for improvement and gives business decisions a firmer foundation.

Key benefits

There are many benefits of a client survey but here are just a few:

- **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**
- **Highlight client service measures that can improve the relationship**
- **Identify client development opportunities**
- **Spot any problems early**
- **Understand how you are compared to competitors**
- **Understand how clients see the market more generally – trends and concerns**
- **Pinpoint how client relationships will evolve and what clients will expect from you in the future**

Don't forget that commissioning an independent client survey signals to clients that you value the relationship and have a desire to improve. There is a certain amount of kudos involved.

'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

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 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 future
- Quality of creativity
- Quality of client service
- Quality of strategic advice
- Ability to add value
- Views on your website, communications and social media
- Personality, culture and values of your practice.
- Main expectations of you 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 has deep industry understanding. Jonathan Kirk and his team ask the right questions in an insightful and personable way that gets honest responses. Recommend!'

Julie Oxberry

CEO & Co Founder, Household



'Up to the Light are uniquely equipped to find out what clients really think. They are experts at asking the right questions and drawing clients out for richer feedback, then skilfully making sense of that in terms of the implications for our business. The fact that they are leaders in client surveys and conduct so many interviews also means that they can view our survey with real perspective, and give valuable context.'



NICK DORMON

MANAGING DIRECTOR, ECHO BRAND DESIGN



02 ACTIONABLE EVIDENCE



Actionable evidence

All our client surveys are based on interviews, either by phone, 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 your 'performance' can be meaningfully assessed and then monitored over time. These are compared to industry averages.

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.

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 professional services providers lies not in the quality of their output, 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.

'Jonathan has invaluable insight into the relationship between agencies and clients. His views are founded in genuine knowledge and he applies them with great skill.'

Steve Pearce
Managing Director, LOVE



'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



03 OPTIONS



There are 3 main packages:

01

Spot Interviews

Selected interviews with one or more key clients (under 10 interviews). There may be a review or contract renewal coming up, a major project may have recently been completed or it may simply feel like a good time to assess important relationships.

02

Client Survey

A minimum of 10 interviews up to a ceiling of 30 interviews. It is at these numbers that we can draw meaningful conclusions across a client base. We can differentiate consistent issues versus client specific ones.

03

Client Surveys Plus

These are client surveys covering from 30+ interviews. They can also involve a market research element that explores client and market issues, above and beyond questions about the client/agency relationship.

Whether **Spot Interviews**, a **Client Survey** or **Client Surveys Plus**, 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 diarise interviews. Conduct all the interviews.

03

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 debrief presentation with recommendations.



'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



04 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 professional services firms to define their 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 organisations 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 from global to national and regional, from middle managers to Chief Executives of major organisations.

Up to the Light is proud to publish the annual 'What Clients Think' report, the definitive snapshot of the client/agency relationship.

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 agency career included senior positions as a Director of Fitch, the global branding group, and New Business Director at EHS Brann (now Havas Helia).

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) and Design Skillnet. 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 the client/agency relationship.



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 £4m 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.



Abbott	BUPA	First Quantum Minerals	KappAhl	Nisa	Takeda
ABN AMRO	Burger King	Footlocker	Kerry Foods	Notcutts Garden Centres	Teleflex
Addis	Burton	Forever 21	Kimberly Clark	Novartis	Tesco
Adidas	Busaba Eathai	Fred Perry	KFC	Nu Skin	Teva Pharmaceuticals
ADT	Butlins	Freeview	Knight Frank	Oakley	The Benfield Group
AEG	Cala Homes	Fujifilm	Ladbrokes	Oasis	The Body Shop
Ahold	Calvin Klein	Galliford Try	Lakeland	Ocado	The British Retail Consortium
AIB	Cardiff University	Gallaher	Land Securities	Ofcom	The Lubrizol Corporation
Al Maya Group	Carlsberg	Garrett Motion	Leger Holidays	Olympic Holidays	The National Gallery
Aldermore	Carnival Cruises	Gates Corporation	Levi's	Olympus	The National Trust
Aldi	Cereal Partners Worldwide	Gilead Sciences	Life Technologies	One Stop	The Royal Navy
Allergan	Christian Louboutin	Glasgow Housing Association	Lipsy	Oracle Corporation	The Salvation Army
Alpha Group Plc	Citifinancial	Glenisk	Lloyds of London	Orange	The White Company
Amica Law	CLS Holdings	Great Rail Journeys	Lloyds Pharmacy	Original Travel	Timberland
Anglo American	Codexis	Grosvenor Estates	Loaf	Orsay	Titan Travel
Ardene	Constellation Europe	Guys & St Thomas'	Logitech	P&G	Tomkins
Argent Group	Converse	Hammersons	London Fire Brigade	Palmer & Harvey	Topshop
Argos	Cosmed	Henkel	Luxottica	Penguin Random House	Travis Perkins
Arthritis Research UK	Cricut	Henri Lloyd	Madame Tussauds	Philip Morris International	Tristar
Arup	Crown Estate	Highland Spring	Magnomatics	Philips	TSB
Asda	CSIRO	Hines	Mallinckrodt	Pizza Hut	Turner Entertainment
Aston Martin	Cushman & Wakefield	Historic Royal Palaces	Manchester City Galleries	Polaroid	Twinings
Atlas Genetics	CYBG	Homebase	Marie Stopes	Primark	UBS
Aurora Fashions	Danone	Honda Europe	Marks & Spencer	Prudential	UK Trade & Investment
B&Q	Davidoff	HSBC	Mars	Pukka Herbs	Umbro
Bacardi	De Poste	HTC	Matalan	Raiffeisen Bank	UNESCO
BAFTA	Debenhams	Hubrecht Institute	Maxeda	Raytheon	UNHCR
Bank of England	Dell	Hutchison	Maxol Group	RBS	UNICEF
Barclaycard	Delmec	Hyve Group	McKinsey	Reed Exhibitions	Unilever
Barclays	DePuy Synthes	IBIS Biosciences	Mears Group	Reitmans	University College London
Barilla	Diageo	IMG	Mecca	Renasas Electronics	University of Bedfordshire
BASF	Diesel	Imperial Tobacco	Meny	Rentokil Initial	University of the West of England
Bawag PSK	Digital UK	INEOS	Mercedes-Benz	Republic Technologies	University of Westminster
BBC	Dixons Carphone	Informa	Merck	Rolux	University of York
Bear Grylls Ventures	Dorothy Perkins	Inivista	Met Office	Royal Mail	Vauxhall
Berkeley Group	Dublin Bus	Innocent	Michelin	Royal Opera House	Ventac Partners
Belleair Holidays	Dunhill	Interfacefloor Europe	Microsoft	Saga	Verinata Health
Belron	DuPont Teijin	International Olympic Comm.	Miller Brands	Sage	Vertex Pharmaceuticals
Berlitz	Durkan Group	Intu	Ministry of Defence	Sainsbury's	VF Corporation
Beyerdynamic	eBay	Investec	Monica Vinader	Securistyle	Visa
Biffa	Edgescan	Ionis Pharmaceuticals	Monsoon	Sequel	Vodafone
Blackstone Group	Electronic Arts	Iris Group	Moss Bros	Seyvern Trent	Waitrose
BMW	Element Six	Isis Pharmaceuticals	Mothercare	Shell	Walt Disney
Boehringer Ingelheim	Energia	James Retail	Mr Price Group	Skechers	Wanda
Boots	Enterprise Car Hire	Janssen Pharmaceuticals	Musgrave Group	Smiths Group	Warner Bros
Bord Bia	Eurasian Natural	Jigsaw	National Grid	Solvay	Weetabix
Boston Scientific	Resources Company	JLT Group	NatWest	Spar	WH Smith
Boux Avenue	Euromoney	John Lewis	NEC	Spirax Sarco	Whitbread
Bowers & Wilkins	Europa Capital	Johnson & Johnson	New Look	Spire Healthcare	Wickes
Breast Cancer Care	European Land	Jones Bootmaker	Nestle	Starbucks	Wisdom
Bristol Airport	Experian	Jones Lang Lasalle	Nexxon	Steptoe	WWF
Bristows	Falite Ireland	Jordans Cereals	Next	Storeys:ssp	Yodel
British Army	Fever Tree	Joules	NHS	Superdrug	York Museums Trust
BT	Filtrona	JTC Group	Nike	Swatch Group	YouGov. and many more...

+44 (0)1273 573806

info@uptothelight.co.uk

uptothelight.co.uk

[linkedin up-to-the-light-ltd](#)

Up to the Light Ltd. Citibase Brighton, 95 Ditchling Road, Brighton BN1 4ST

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