



build trust. build your business.™

## Case Study:

## Satisfaction = Growth

### The Challenge

AmCheck a Payroll and Human Resources Services provider in San Diego, California was looking to gain insight into the minds of their clients. Although they thought they were doing good job, they had never bothered to ask their customers. AmCheck asked the Corlea Group to help them measure their client satisfaction and to create a plan on how to positively leverage the results.

### The Solution

The Corlea Group conducted an Account Acceleration™ Client Survey to measure client engagement with AmCheck's solutions. This survey was designed for a high response rate by being simple and to the point.

- ✓ Conducted survey over a two week period with over 40% of the client base responding.
- ✓ Calculated AmCheck's Net Promoter Score, a leading measure of client satisfaction and engagement.
- ✓ Examined every response from over 140 clients and categorized responses based upon content.
- ✓ Delivered a comprehensive report of observations based on patterns and client comment-insights.
- ✓ Gave specific recommendations on how AmCheck could leverage the data to trouble shoot issues with clients as well as leverage the positive feedback to solicit referrals, references and develop case studies for marketing purposes.

### The Results

Over the course of the next year, Amcheck created proactive plans to address individual and overall client issues. In addition to stabilizing their client base, they identified new business opportunities with current clients.

- ✓ Saved thousands of dollars in revenue by being able to proactively work on client issues.
- ✓ Identified multiple add-on business opportunities with their current clients increasing revenue.
- ✓ Leveraged information to identify new business opportunities creating new revenue.
- ✓ Changed client services approach with measurable benchmarks creating greater client affinity.
- ✓ Rolled out client loyalty survey across AmCheck office network strengthen overall revenue base.

*"I would highly recommend Jack Kelly (and the Corlea Group) to any business owner or manager. Jack has an exceptional skill set in both sales and operational consulting which is very rare to find in the marketplace. The impact of Jack's work with my organization has been twofold; increased sales and increased client retention. I am extremely pleased with both of those results. If you are a small to mid-size firm looking to get to the next level, without question, Jack Kelly is the professional that can help you get there." Scott Maichel, Principal, [AmCheck](#).*

clarity. performance. growth.

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