

Bookkeeping Services Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

Think about the bookkeeping service for the reporting period named above. Describe the service process without including figures, account details, tax information, or client records. Every question is optional.

1. Which part of the bookkeeping service did you use during this period?

- ☐ Sending records only
- ☐ Reviewing reports only
- ☐ Both sending records and reviewing reports
- ☐ Another part of the service
- ☐ I did not use the service during this period

2. How clear were the requests for the records you needed to provide?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear
- ☐ Not applicable

3. How easy was it to provide the requested records through the agreed process?

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neither easy nor difficult
- ☐ Somewhat easy
- ☐ Very easy
- ☐ Not applicable

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4. When did you receive the agreed reports?

- ☐ Before the agreed date
- ☐ By the agreed date
- ☐ After the agreed date
- ☐ I am still waiting and the agreed date has passed
- ☐ The agreed date has not arrived
- ☐ No date was agreed
- ☐ Not applicable

5. How clear were the explanations of the reports?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear
- ☐ I did not receive an explanation
- ☐ Not applicable

6. If you requested a correction, what is its current status?

- ☐ Resolved
- ☐ Partly resolved
- ☐ Still open
- ☐ I do not know
- ☐ I did not request a correction

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7. What one change would make the bookkeeping service easier to work with?
