clearlyrated®

A Buyer's Guide

Client Feedback & Survey Software for AEC Firms

In the architecture, engineering, and construction world, relationships are everything. Whether you're planning, breaking ground, or handing over final plans, the client experience you deliver along the way can make or break your next opportunity. That's why collecting and acting on client feedback is no longer a nice-to-have—it's mission-critical.

Yet many firms still struggle to gather feedback in a way that's timely, actionable, and aligned with how projects actually unfold. Manual processes are burdensome, survey response rates are low, and insights rarely translate into improvements. This is where client feedback software steps in. But not just any software—the right software, purpose-built for the AEC industry.

This guide will help you explore what that looks like and why it matters.

The Case for Specialized Client Feedback Software

Client feedback tools help firms listen, learn, and lead with confidence. They allow you to gather insights from clients across key project milestones, turn that data into actionable insights, and follow up in ways that build trust. But AEC firms need more than a simple survey tool. You need a system that's attuned to your project lifecycle, easy for teams to adopt, and powerful enough to drive both relationship and revenue outcomes. Generic platforms may work in retail or tech, but they don't account for the unique rhythm of AEC work. Your projects are long, complex, and relationshipdriven. You need a platform that understands that.

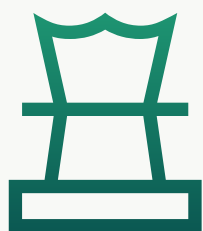**Client feedback is often misunderstood as a marketing function. In reality, it's an executive tool for:**
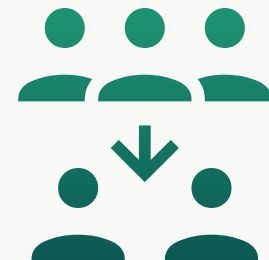
Revenue Growth

Margin Protection

Risk Mitigation

Strategic Planning

Client & Team Alignment

What to Look For in a Purpose-Built Platform

The best client feedback platforms are designed around the AEC project lifecycle. Instead of static quarterly surveys, they enable firms to gather feedback at key moments—kickoff, design milestones, delivery, and post-completion. This milestone-based approach means you can course-correct while the project is still in motion, rather than finding out when it's too late.

These platforms also deliver insights in real time. Instead of waiting on manual exports and spreadsheet pivots, you get dashboards that show what's working and what's not—when you need it most. They also provide comparative benchmarks across clients, teams, and even against industry norms.

Key features of purpose-built AEC feedback platforms include:

Milestone-based surveys aligned with the project lifecycle.

Real-time dashboards showing project and client health with automated alerts.

Personalized feedback invitations sent from project managers or relationship owners.

Closed-loop tools for tracking follow-up and resolution.

Integration with industry CRM/ERP platforms like Deltek, Unanet, Salesforce, and Dynamics.

Scalability and firm-wide access with no seat-based licensing.
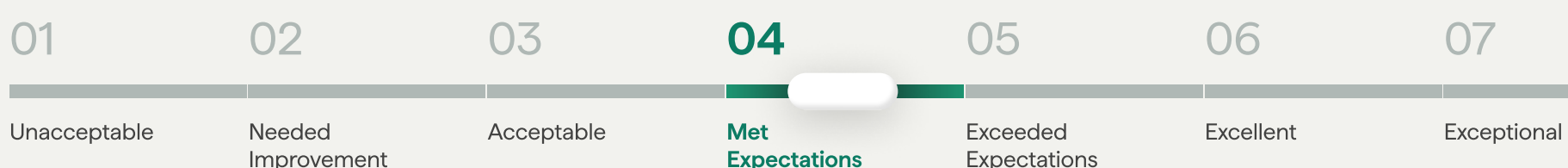
Rethinking Metrics

AEC work is nuanced, and NPS doesn't capture the full range of expectations, frustrations, or opportunities. It reduces complex, relationship-driven interactions to a single number—ignoring context, nuance, and the full client journey. A client may rate your firm an 8 one day and a 10 the next, depending on whether they've had a recent positive or negative interaction. And a single question— "Would you recommend us?"—doesn't help your team understand what to change or improve.

A purpose-built platform goes beyond NPS by integrating comprehensive performance metrics like the Client Experience Indicator (CXI). CXI provides a more reliable snapshot of whether you're meeting or exceeding client expectations at each stage of the project lifecycle. By tying feedback directly to performance benchmarks, CXI not only surfaces issues earlier but also empowers teams to act with clarity and context. to gather rich qualitative data, milestone-specific sentiment, and actionable insights. It's not about abandoning NPS—it's about placing it in the right context, and surrounding it with a system that gathers deeper, more frequent, and more relevant feedback— especially at the moments that matter most within the project lifecycle.

The Client Experience Indicator

Unlike NPS, which focuses on likelihood to recommend, CXI measures whether your firm is consistently exceeding, meeting, or falling short of client expectations. It's a more nuanced, actionable metric specifically designed for professional services and project-based firms.

Helpfulness

01	02	03	04	05	06	07
Unacceptable	Needed Improvement	Acceptable	Met Expectations	Exceeded Expectations	Excellent	Exceptional

Why General Purpose Platforms Don't Deliver

Many AEC firms begin their feedback journey with familiar names like Qualtrics or SurveyMonkey. These platforms offer flexibility, but they weren't built with the AEC workflow in mind—and it shows.

Common limitations include:

☒ **Manual processes for survey deployment and response tracking.**

☒ **Feedback cycles that don't align with project milestones.**

☒ **No built-in accountability or follow-up workflows.**

☒ **Seat-based pricing models that limit access.**

☒ **Generic, transactional surveys that reduce client engagement.**

☒ **Reliance on consultants for integration and customization.**

The Real Cost of Getting It Wrong

When feedback isn't captured—or isn't used—it shows up in the most painful ways:

! **Clients who feel unheard become flight risks.**

! **Missed chances to course-correct become reputational damage.**

! **Teams are blindsided by client dissatisfaction.**

Feedback software that doesn't support real-time response, accountability, and project alignment isn't just ineffective—it's risky.

Proof It Works

Consider a mid-sized engineering firm that shifted from a generic survey tool to an AEC-focused platform. Within three months, they doubled their response rates, reduced feedback admin time by 60%, and uncovered two critical client concerns that were immediately addressed—saving those relationships. In one year, they increased their repeat business by 18%. These kinds of outcomes aren't rare. They're what happens when firms stop surveying and start listening—systematically, strategically, and with purpose.

★ ★ ★ ★ ★

"Before Clearlyrated, we only had a once-a-year survey. So this tool has really helped us get regular feedback. It gives clients a real-time opportunity to offer feedback. We have implemented changes based on client feedback — from project work and also billing and administrative client support."

Sarah H.

★ ★ ★ ★ ★

"We've been working with ClearlyRated for 10 years to demonstrate the high level of service and client satifaction at our firm. I also appreciate that their services continue to evolve, delivering new value and benefits tailored to our industry goals."

Julie J.

Clearlyrated vs. General-Purpose Survey Platforms

Client Savvy was built specifically for project-based firms like yours. While generic survey platforms serve a wide audience, they rarely meet the demands of AEC workflows, client expectations, or the scale of enterprise operations. Here's how Client Savvy compares—and where it offers clear advantages:

Features	Clearlyrated (AEC focused)	Generic survey platforms
Milestone-Based Feedback	✅ Scheduled or triggered at project phases	❌ Manual, often disconnected from milestones
Real-Time Dashboards & Alerts	✅ Built-in with visual insights and automated alerts	❌ Either overly complex, or overly basic, requires exports or third-party BI
Closed-Loop Follow-Up Tools	✅ Integrated, with alerts and accountability tracking	❌ External systems or email-based follow-up
Personalized, Branded Invitations	✅ Sent from PMs, branded with your firm's identity	❌ Generic or static survey invites
Unlimited User Access	✅ Firm-wide access included	❌ Per-seat pricing and visibility limits
ERP/CRM Integration (Deltek, Unanet, etc.)	✅ Seamless, open API with tailored AEC support	❌ Complex, often requires consultants

Features	Clearlyrated (AEC focused)	Generic survey platforms
AEC Expertise & Support	✓ Dedicated onboarding, training, and consulting	✕ Generic support, minimal industry knowledge
Survey Response Rates	✓ 2x higher than average industry platforms	✕ Often below industry benchmarks
Actionable Feedback & Pain Point Discovery	✓ Up to 6x more actionable insights per survey	✕ Limited context, mostly quantitative data
Qualitative Comments Volume	✓ Generates 5x more open-ended feedback	✕ Few written responses, mostly scaled data
Response Automation & Suppression Rules	✓ Built-in to avoid fatigue, automate delivery	✕ Largely manual or unavailable
Business Impact	✓ Drives retention, repeat business, and CX culture	✕ Typically disconnected from outcomes

Clearlyrated isn't just a better tool—it's a smarter system built for your people, your processes, and your clients.

Choose a Feedback Partner

Software alone won't transform your client experience. What AEC firms need is a feedback partner—someone who understands the nuances of project-based work and can help you design a sustainable program that drives results.

A true partner doesn't just implement a tool and walk away. They work alongside your team to co-create feedback plans, craft messaging that resonates, and help build a culture where client insight drives decisions. They provide benchmarks, offer training, and help your firm evolve.

Firms that choose a feedback partner over a software vendor see faster adoption, better insights, and more meaningful outcomes. It's a relationship—not a transaction.

Making Your Decision

As you evaluate potential feedback platforms and providers, it's essential to go beyond surface-level functionality. The right questions can reveal how deeply a platform and its team understand your industry, how they support implementation, and whether they're positioned to be a long-term partner.

Asking the right questions can reveal the difference between a vendor that sells software and a partner that fuels transformation. When evaluating platforms, don't just compare checklists. Look at alignment. Does the platform reflect the way your firm delivers work? Will your teams use it? Can it grow with you? Speak with references. Choose a partner who will grow with you.

Questions to ask prospective vendors

PLATFORM FIT & VISION

- [ ] How do you support AEC-specific workflows?

IMPLEMENTATION & SUPPORT

- [ ] What's your approach to onboarding?
- [ ] Will you help us design our client listening program?
- [ ] Do you provide a dedicated client success manager?
- [ ] What is the typical timeline to go from contract to feedback in the field?
- [ ] Do you help with adoption and culture change?

USER EXPERIENCE

- [ ] What is a "day in the life" like for a project manager using your system?
- [ ] Will this add to their workload or simplify their workflow?
- [ ] How do you ensure that feedback actually gets to the people who can act on it?
- [ ] What follow-up tools are included?

CUSTOMIZATION & BENCHMARKING

- ☐ Do you offer AEC-specific survey templates and question libraries?
- ☐ Can you benchmark our results against industry peers?
- ☐ How customizable are your reports and dashboards?
- ☐ Can we look at feedback from a project or client view?

BUSINESS IMPACT

- ☐ What success have your clients seen?
- ☐ Can you help us measure ROI in areas like repeat business, client retention, and fee recovery?
- ☐ How does your system help us identify at-risk accounts or upsell opportunities?
- ☐ Are we just another client—or a priority partner you'll invest in?

Turn client feedback into profit & revenue.

Great client experience isn't just a matter of delivering on scope. It's about how your clients feel throughout the journey. The right feedback platform—combined with the right partner—helps you listen more closely, respond more thoughtfully, and build stronger, longer-lasting client relationships.

Because in the end, your clients don't just remember what you did. They remember how you made them feel.

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