

## Best Client Survey

*(Intended to be conducted face-to-face, not intended to be left with clients)*

Instructions: Interview 5-7 of your best clients using this tool.

It is essential that you deeply probe your client responses by asking follow-up questions shown where appropriate, i.e. you need to find the “why” of what they express.

This tool is extraordinarily helpful in finding:

1. Why clients do business with you.
2. Places to elevate client experiences.
3. And gathering new assets.
4. And, most importantly, discovering your Unique Value Promise

Use the following script with the Best Client Survey.

*“I/We want to find out your opinion of the services that I/we are providing to you right now. So let’s have breakfast or lunch one day next week to discuss this important topic. Would Tuesday or Thursday be best?”*

**Conduct survey in a face-to-face meeting with client.**

<b>Name</b>	<b>Vertical/Target/Niche Market</b>
<b>Phone Number</b>	<b>E-mail Address</b>

1. As a client, what do you feel from your point of view is our three greatest strengths? Please explain the advantages you see from this strength?

2. With which, if any, of the financial concerns below are you most concerned? (Please check any and all that apply)

- Business Succession Planning
- Educational Expenses
- Estate Planning
- Executive Compensation Plans
- Family and Asset Protection
- Investment Services
- Making Investment Decisions
- Planning for Effective Building of Wealth
- Retirement Planning
- Tax Planning
- Tempering Potential Market Volatility
- Premature Death
- Being Sued
- Medical Expense for serious illness/accident
- Long Term Disability
- Long Term Care

3. Based on the items we just discussed, how familiar are you with the range of services we offer in these areas?

- Not at all familiar
- Vaguely familiar (25%)
- Somewhat familiar (50%)
- Familiar (75%)
- Very tuned in (100%)

What is the best way to answer your questions in these areas?

4. Tell me about your overall experience with our products and services.

Would you say you are:

- Delighted
- Satisfied
- Moderately satisfied
- Dissatisfied

Why do you feel the way you do?

5. Please rate us in the areas of courtesy and responsiveness, when you call our office for an appointment of with a service question.

- Delighted
- Satisfied
- Moderately satisfied
- Dissatisfied

Please explain from your point of view.

6. When you think of your **service experience** with me and my team, what descriptive words or phrases come to mind? (Probe for more)

7. As an active and interested firm in the community, we like to participate in organizations that are important to our clients. What business associations or community groups are you active in where you think we should consider investing our time or resources?

Capture the name of the organization and their involvement.

	Name	Involvement
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____

8. If we wanted to meet with someone such as the head of this group, would you be willing to make an introduction? If yes, what would be the best way to do this from your point of view?

9. What are the charities that are most important to you and why?

10. How would you describe the role that I and my team play in your financial decisions?

11. Please rate your willingness to promote our firm to your friends, family and colleagues.

Enthusiastic endorsement

Willing endorsement

Moderate endorsement

Unwilling to endorse

Why do you feel the way you do?

12. Over time, there will be financial topics we will want to educate you on – do you prefer getting information via a one-on-one consultation, an informal workshop or in a series of monthly (or bi-monthly) briefings by telephone?

13. When you think of your overall experience with myself or my team, what descriptive words, phrases or images come to mind?

14. Are you familiar with other companies that offer similar products and services as we do?

15. If you've worked with any of them, now or in the past, what has been your experience in a couple of words?

16. When you think of protecting the things you hold dear (family, business interests, investments), what are some of the descriptive words or images that come to mind?

17. Help me to complete these sentences...As an example: How would you complete the following 3 sentences?

*You help us . . . .*

*Your team enables us to . . . .*

*Your firm provides us with . . . .*

18. What is the best time for us to get in touch with you?

19. What is your preferred mode of communication for occasional updates?

- Face-to-Face
- Telephone
- Email
- Mail
- Other: \_\_\_\_\_

20. Do you rely on other people's advice or counsel when making a major financial decision? If so, who would that be?

21. Do you feel this person is appropriately "in the loop" with your current financial plan?

22. If not, how would you suggest this person be kept informed?

- Face-to-Face
- Telephone
- Email
- Mail
- Other: \_\_\_\_\_

23. If we were to conduct an informational seminar or client appreciation event for our top clients, what type of event you would be willing to attend? In other words, would you like something tied more to your professional business, your lifestyle interests, or both? (Please circle one or both.)

*Professional Business*

*Lifestyle Interests*

24. What suggestions do you have for topics of particular interest, or an event you would like to see us sponsor?

25. What time would be best for you for these seminars or events?

- Preferred Months:
- Time of Day:

26. What do you believe sets us apart from all other financial teams?

27. As a client, in your own words, how do you describe what we do for you when talking with your friends and colleagues about us? Why do you feel so strongly about this?

28. We want to be **YOUR CHOICE** for your financial needs. What else can we do to **EARN** your enthusiastic endorsement on a consistent basis in order to continue to serve you, and possibly your friends, family members, and professional colleagues?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

29. Finally, what are 3 things we can do. Not 1, but 3 things we can do to strengthen our relationship with you?

*Thank you for your time and attention!*

*We will be coming back to you to share what we believe is our Unique Value Proposition for top clients like you and ask you to help us select the right one!*