# **Survey Template**

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| **1. Your Name (Optional)** |
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| **2. How valuable do you find the following services offered by [Advisory Firm Name]?** |
|  | 1 (not valuable) | 2 | 3 | 4 (somewhat valuable) | 5 | 6 | 7 (very valuable) |
| Client Portal |  |  |  |  |  |  |  |
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| **3. How do you feel about the current pricing of fees, relative to the value of the services [Advisory Firm] provides?** |
| 1 (Overpriced compared to the financial advice I receive) | 2 | 3 | 4 (Pricing isn’t great, but isreasonable for the value) | 5 | 6 | 7 (Great value for what is offered) |

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| **4. How do you feel about the frequency of the following services offered by [Advisory Firm]?** |
|  | 1 (Too infrequent – I want more) | 2 | 3 | 4 (Just right!) | 5 | 6 | 7 (Too frequent – it feels overwhelming) |
| Meetings with my financial advisor |  |  |  |  |  |  |  |
| Webinars |  |  |  |  |  |  |  |
| Client newsletters |  |  |  |  |  |  |  |
| Investment report updates |  |  |  |  |  |  |  |

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| **5. How would you rate [Firm’s] overall responsiveness?** |
| 1 (Responses take longer than [X hours] and do not solve my problem) | 2 | 3 (Response time is usually longer than [X hours/X days]) | 4 (Response is usually timely, but does not always solve my problem) | 5 | 6 | 7 (Response is timely and solves my problem) |

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| **6. How valuable would you find the following potentially new offerings from [Firm]?** |
|  | 1 (not valuable) | 2 | 3 | 4 (somewhat valuable) | 5 | 6 | 7 (very valuable) |
| Tax Preparation |  |  |  |  |  |  |  |
| In-person quarterly events |  |  |  |  |  |  |  |

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| **7. What is one thing we could do to make your experience with our firm better?** |
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| **8. What is one thing we should be sure to keep doing and not change?** |
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# **Email Templates**

### **Email 1: Invitation For Survey**

Title: Your Input Requested: Client Survey

Dear [Name],

I’m excited to announce our first client survey goes live today! You can have a voice in the future of [Firm] – tell us what you would like to see more of, weigh in on future offerings, and let us know where else we can improve your experience!

The survey has [7] questions and should take about [5] minutes to complete. The survey is open until [date].

Thank you in advance for your time. Your honest thoughts will help [Firm] serve you even better!

[Link to survey]

Sincerely,

[Your Name]

### **Email 2: Last Chance**

Title: Last Chance: Tell us how we can better serve you!

Dear [Name],

This is a friendly reminder that our survey closes on [Date]. We would love to have your feedback on your experience with [Firm] – what we’re doing well and what new services we could offer to better serve you in the future.

The survey consists of just [7] questions and will only take a couple of minutes to complete. Your honest feedback is invaluable to us, and we greatly appreciate you taking the time to share your thoughts!

[Link to survey]

Sincerely,

[Your Name]

### **Email 3: Thank you and follow up**

Title: Changes To [X] And Client Survey Results!

Dear [Name],

Thank you to everyone who participated in our recent client survey. Your feedback was truly invaluable, and we are so grateful to everyone who took the time to share their thoughts.

While there are more changes based on the survey still to come, we’re excited to announce that, as a direct result of your feedback, we will be [changing/enhancing/reformatting] [specific offering], starting around [date].

Thank you again to everyone who participated. We look forward to continuing to build a firm that better serves each of you!

Sincerely,

[Your Name]