



CHRIS JARVIS

*See Differently. Business Differently.*

## 12-Day Turnaround with Chris Jarvis

### Day 2 – Client Feedback

The most valuable feedback you can get is from people you have worked with in the past. A very powerful question to ask someone is,

“On a scale of 1 to 10, how would you rate my contribution to our relationship over the last 30, 60 90 days?”

If you have the courage to ask that question (of your spouse, employees, partners, and clients) you will receive very valuable feedback.

The sample text below can be copied and pasted into your own materials. Feel free to use these with your existing clients AND prospects who did not go through with your implementation.

Dear \_\_\_\_\_

I am honored to have had the opportunity to work with you recently. I understand that you could work with any advisor, but you chose to work with me. It is important to me to provide the highest level of service possible.

To help me do a better job in the future, and to help me provide valuable customer feedback to my insurance industry committees and organizations, I would like to ask you a few quick questions. Your responses will be very valuable, but your name or personal information will never be shared with anyone in any of my study groups or focus groups.

Though I am primarily focused on our interactions, feel free to share thoughts and comments about interactions you have had with other advisors. These will help my committees that are offering valuable feedback to the industry.

1. How easy was it for you to schedule a meeting/discussion with me in the first place?  
How would you have liked to be contacted initially?

2. What would have made the interview and data collection process more efficient or effective?

3. What part of the process made you trust me with your planning? Is there a better way I could have gotten to know you and your family better?

4. How would you have preferred to have learned about options and alternative solutions to your concerns? Written papers, visuals, in person presentations, other?

5. What would make my presentation more effective? Easier for you to follow?

6. On a scale of 1 to 10, how did you feel about the application and underwriting processes? Did it take too long or was it just right?

7. How would you like me to help you communicate with you on an ongoing basis?  
Email? Letters? Text?

8. Who else do you know who could benefit from my services?

9. How can I help you introduce me to those who need my help? Do you need a biography, a brochure, a website link, or something else? Would it be best for the three of us to have coffee (my treat) to see if I can of value?

10. How often would you like me to review your current situation to see what else we can do to help you?