

Sample Exit Survey

Introduction

It is tempting to think of a departing client as a lost client and quickly direct your attention to your current clients or prospects, but departing clients can provide valuable insights. When you learn that clients are leaving, consider asking them to spend some time telling you why. Dissatisfied active clients may be reluctant to point out areas for improvement for a variety of reasons (they don't want to get someone fired, they don't want to strain the relationship, etc.), but clients who are moving on may be more willing to speak with you frankly about what is wrong. These conversations may be able to help save and improve relationships with your current clients and prospects.

Below is a sample set of exit-interview questions that you may want to consider as you think about evaluating the causes of client departure.

EXIT SURVEY: SAMPLE QUESTIONS

1. Thinking back over your time with [Firm Name], what is the most positive you felt about [Firm Name] at any given time?

(1 – completely dissatisfied, 5 – completely satisfied)

1	2	3	4	5
<input type="radio"/>				

2. Using the same scale, what was your feeling about your relationship with [Firm Name] at the time you decided to take your business elsewhere?

(1 – completely dissatisfied, 5 – completely satisfied)

1	2	3	4	5
<input type="radio"/>				

3. What was your reason for deciding to leave? (Check all that apply.)

Poor service	<input type="checkbox"/>
Poor investment performance	<input type="checkbox"/>
Loss of trust	<input type="checkbox"/>
Too costly	<input type="checkbox"/>
Competitor pitch	<input type="checkbox"/>
Other	<input type="checkbox"/>

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4. Did you address these concerns with any associates at the firm?

No

—If not, why not?

Yes

—If yes, did you feel that they took your concerns seriously and made an effort to fix the underlying issue?

5. Thinking back to the beginning of your relationship with [Firm Name], what expectations did they set?

6. Were these expectations:

Met for the duration of the relationship	
Met at first, but then stopped being met over time	
Never met—the expectations set did not match my experience	

7. What, if anything, could [Firm Name] have done differently to keep your business?

For more information, please contact your Fidelity Representative.



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