

Client Survey Process Template

Process: Client Survey Process

Description: Process used annually to send the client feedback survey.

Category: Client Service

Keywords: Client Survey / Surveys / Client Feedback / Client Survey Sample

Last Updated: (Date) **Updated By:** (Name)

Locations Referenced:

- Project Management Tool - Template – Client Survey Process

PROCESS DETAILS:

STEP #	WHAT	WHEN	WHO
1	Determine the survey topic(s)	Annually, by Nov. 15	Advisor
2	Finalize survey send/due dates	Annually, by Nov. 15	Operations Associate
3	Finalize target client list	Annually, by Nov. 15	Operations Associate
4	Create survey in digital survey tool	One week prior to send date	Operations Associate
5	Send survey and client list to advisor/leadership team for approval	One week prior to send date	Operations Associate
6	Administer survey	Target send date, determined by Step #2	Operations Associate
7	Survey completion tracked and updated on CRM	Client Review meeting; As completed	Operations Associate
8	Aggregate and analyze survey data for presentation to advisor/leadership team	One week after survey due date	Operations Associate
9	Hold team meeting to address survey	Two weeks after survey due date	Advisor
10	Thank your clients for participating in the survey	Within one month after survey due date	Operations Associate