

Information and planning steps you can use to make the most of...

Your Touch Point Advantage

QUESTIONNAIRES

Questionnaires are a great way to get input from your customers.

They can be used in any number of ways:

- Ask customers for a grade and/or comment after a service call
- Ask selected customers to grade and/or comment after a recent service call
- Conduct a general customer satisfaction survey
- Identify cross-selling and account rounding opportunities
- Identify customers interested in coverage reviews
- Find out about insurance business your agency doesn't already have
- Ask if they would recommend your agency
- Ask for a referral

QUESTIONNAIRES
CAN BE USED FOR
MUCH MORE
THAN IDENTIFYING
PROBLEMS. THEY
CAN BE USED
WITH VARIOUS
TYPES OF
CUSTOMERS AT
DIFFERENT POINTS
IN TIME.

- Receive comments for use as testimonials
- Get leads to follow up on for testimonials
- Gauge the effectiveness of your marketing, advertising or branding efforts
- To identify areas where coverage may be lacking. For example:
 - Identify personal property which should be scheduled or which requires additional coverages
 - Identify coverage gaps

Questionnaires can be used with various types of customers at different points in time:

- Customers who received the quote but didn't purchase coverage
- New customers (within the last three months)
- High-value customers

These tools are being made available for your use by PIA and The Partnership.



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Central Insurance
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State Auto
Travelers

- Customers who expressed satisfaction during a service call
 - Customers who expressed dissatisfaction during a service call or other communication
 - Commercial lines customers – decision makers
 - Commercial lines customers – support staff
 - Clients who recently left the agency
 - To gauge satisfaction or discover questions from customers prior to their renewal
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Use the following checklist of questions to help you design surveys for your agency:

Office Facility:

- Are our current office hours (9AM-5PM) convenient to properly serve you?
- Did you feel a sense of privacy in our agency?
- Was our office location convenient and easy to find?
- Was the agency professional and clean?
- Was the office parking lot clean and professional?
- Were you able to find a spot to park without a problem?

General Staff:

- Rate the courtesy of our staff:
- Did a staff member greet you as you entered the office?
- Do you always find our staff to be helpful, polite, and courteous?
- Every time you visit the office, is a staff member there who can help you?
- How would you grade us in each of the following areas?
- Overall customer service
- Was the staff friendly and easy to work with?
- Was the staff knowledgeable in the areas of billing that I needed help with?
- Was the staff knowledgeable in the areas of my policy I needed help with?

Agent:

- Did the person you worked with at our agency explain all coverages and the billing and claim process to you?
- Did the person you worked with at our agency express to you that they care about your concerns?
- Do you believe that the agent you worked with has given you the proper coverage for your needs?
- Was the agent available at the time you requested?
- Was the agent knowledgeable in his/her field of expertise?
- Was the agent you dealt with helpful and willing to do the best job possible?
- Was the agent you worked with willing to work with your schedule?
- Was the person you worked with at our agency courteous, clear and prompt in answering your concerns?

Were all your insurance questions answered to your satisfaction by the person you worked with at our agency?

Did the agent offer to discuss life insurance with you?

Did the person you worked with at our agency discuss other insurance coverage we can provide?

Referrals:

Would you recommend this agency to your friends and family?

If yes, please share your referral's name and address so we can send them information about our company.

Would you recommend us to someone you cared about or someone whose respect you value?

Would you refer a prospective customer to us?

Confidence:

Did you feel that brochures or other materials we've shown you explained our insurance products to your satisfaction?

Did you feel the agent you worked with explained your policy options well enough?

Do you feel that if you had a claim today, it would be paid?

Has our staff done a good job explaining your coverages to you?

How would you grade us in each of the following areas?

How did you find out about our agency?

Mail

Newspaper

Phone

Referred by someone

Web search

Yellow pages ad

Ad (newspaper, radio, TV, other)

Email from us

From the sign on our agency

Other _____

Responsiveness:

Are you satisfied with our promptness in the answering phone?

Has our staff always been able to answer questions to your satisfaction?

Have the changes you've requested been handled well?

Have you been satisfied that our staff members display a caring attitude?

Have you been satisfied with our handling of a claim?

Have you been satisfied with our promptness in resolving any problems?

Have you been satisfied with the ability of staff members to answer your questions on the spot?

Have you been satisfied with the accuracy of your billings?

Have you been satisfied with timely responses to changes you want made?

Have your phone calls to us been returned promptly?

How would you grade us in each of the following areas?

Policy & certificate issuance

Promptness of return calls

Responsiveness to special needs

Speed at which we correct errors

Was the person you worked with at our agency courteous, clear and prompt in answering or returning your call?

Overall satisfaction:

Are you pleased with our service?

As a result of your last experience with us, would you make us your first choice for insurance in the future?

What is your overall rating of working with us?

Open ended response:

Additional Comments

If we didn't meet your needs, how can we improve our services or products?

If you feel you would like to suggest any way we can improve our service, please use this space:

Is there anything we can do that we're not?