

moneymappers.co.uk

## CUSTOMER QUESTIONNAIRE

Customer Name:

Date

- |  | <b>Yes</b>               | <b>No</b>                |
|--|--------------------------|--------------------------|
| 1. Thinking about your first contact with our adviser, was your overall impression a positive one immediately after the meeting was concluded? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you feel that our advice was given in a clear and easily understandable format with any industry jargon explained or clarified?          | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you understand the main purpose and features of the product(s) you have purchased?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Do you feel that all documentation received was clear and easy to understand?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Were you happy with the After Sales Support provided by moneymappers?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Was our Adviser accessible, efficient and helpful in resolving any queries that you may have had?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. If you contacted our Administration Team were they courteous, professional and efficient?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Overall, did the service received meet your expectations?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Would you consider recommending our service to friends/family?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Do you have any queries about the service you have received or the products you have purchased?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Do you use our online services, if not would you like a remote demonstration?  | <input type="checkbox"/> | <input type="checkbox"/> |

12. What did you like about our service?

13. What did you dislike about our service?

14. What, if anything, would you change about our service?

---

## Thank You

We welcome your comments or suggestions as to how our service can be improved and would like to thank you very much for taking the time to complete this questionnaire.

All responses are treated in confidence and will be used only to ensure we continue to deliver the very best service to our clients.