

## INTERACTIVE CLIENT SURVEY SCRIPT (FOR NEW CLIENTS):

### INTRODUCTION:

Thanks again for taking a few minutes to chat with me. We really believe the best way to elevate the client experience is to listen to the people we serve. You have just been through the early stages of working with our team, so your perspective is incredibly valuable. We want to understand what felt really good and where we can keep improving, so thank you again for being open and candid with us.

### CONVERSATION QUESTIONS

1. To start, when you think about choosing to work with us instead of another firm or doing everything yourself, what stood out as the most valuable thing we bring to the table for you?
2. If someone asked you what makes CandorPath different, what would you tell them?
3. Thinking back through account setup, paperwork, transfers, and communication along the way, where did we do well, and where could we sharpen things? Did the cadence and clarity feel right? Too frequent, not enough, or somewhere in the middle?
4. You have your Next 90 meeting with <advisor name> coming up soon. Is there anything specific you want to make sure we cover that we may not already be aware of? **<Use as opportunity to remind client of services provided / share infographic>**
5. We operate as a team of eight, each with a defined role supporting your plan and experience. Do you feel clear on who does what, or could we do better there? This question is not a test. It is simply an honest way for us to learn how to keep improving communication.**<share team infographic>**
6. As you think about the whole start of your journey with us, is there anything we could offer or share that would have made it even smoother or more helpful?

## THE ASK AND REFERRAL PHILOSOPHY

Before we wrap up, I want to talk about something that can sometimes feel awkward but really matters to us. Our firm has a long term focus on thoughtful, **responsible growth**. We want to continue serving our current clients at a very high level while also helping people who would benefit from our guidance.

Over the next year or so, we will likely bring on around **eight to ten new client families**. Almost all of them will come through existing relationships and introductions, because the people you trust tend to be the people we are most aligned to serve well.

Now, this is never about pressure. You know our intent already is not about that. Our priority is always the people we serve. But I have learned that if I never mention this, our clients assume we are not taking on anyone new.

So from your point of view, if I am going to bring this topic up at all, what is the most comfortable and appropriate way to do it?

**(Pause here depending on their answer)**

If you are ever in a situation where you want to introduce someone to us, what is the easiest and most comfortable way for you? Some clients prefer a group text or email intro, others like to give us a heads up before connecting someone, and some prefer we simply be available if a friend reaches out. There is no right or wrong way. We just want to make sure it feels natural and respectful to you and the person you care about.

## CLOSE

Thank you again for your honesty and your trust. We want every touchpoint with us to feel thoughtful and human, and your feedback helps us stay true to that. If you ever think of anything else, please reach out. We always want to keep getting better.