Client Exit Survey

When a client leaves, for whatever reason, conduct a client exit meeting. Follow-up with a thank you note and ask them to complete a Client Exit Survey. A client exit interview is an important tool to get information that can identify opportunities to improve your services and grow your business.



Tip: Ask open-ended questions when possible to get the most complete information. If using a checkbox format survey, try and provide a scale of responses instead of a yes/no response.

- [ ] Did we meet your goals?
- [ ] Is our staff knowledgeable?
- [ ] How could we have improved our communications with you?
- [ ] How was our onboarding when you became a client?
- [ ] How was our close-out process when you left us as a client?
- [ ] What do you wish we had done differently?
- [ ] What do you dislike about our services?
- [ ] Are you likely to recommend our agency to a colleague or contact?

A Client Exit Survey is likely too late to salvage a client relationship. Implement ongoing Client Satisfaction Surveys as part of your CRM system.