

FOLLOWING UP WITH NON-RESPONDING SURVEY RECIPIENTS

Sample Scripts & Troubleshooting for Survey Non-Responders

It is completely acceptable (and encouraged) to follow up with contacts who have not responded to your survey. We suggest using the following script as a guideline. Remember, you want to encourage participation, emphasizing the importance of their feedback and continue to build the relationship with a call. However, we want to give them the opportunity to respond, without becoming an annoyance. The process is as important as the outcome.

SAMPLE SCRIPT

“Hello [client’s first name], this is [your first name] with [firm name]. We’re in the middle of this quarter’s satisfaction survey and I wanted to make sure you had the opportunity to participate. Did you receive an email last week with a link to a [insert #] question survey?”

TROUBLESHOOTING COMMON RESPONSES

1. “I never received the email.”

Your Response: *“I’m sorry to hear that. I’d love to have you weigh in with your thoughts. Can I resend the link to you?”*

[Send link from nonresponse list downloaded from your MyInavero Dashboard page.]

2. “I saw that email, but haven’t had a chance to respond yet.”

Your Response: *“I know there are a lot of things on your plate, but this will really help us identify how to improve our process and the way we serve you. It’s just [insert #] questions, so it will only take you a minute or two. I can resend the link to you if that makes it easier.”*

[Send link from nonresponse list downloaded from your MyInavero Dashboard page.]

3. “I don’t have time to take the survey. I’ll let you know if I need you to do anything differently.”

Your Response: *“I understand. We kept the survey to [insert #] questions to help combat that, but I don’t want it to be a burden either. If you get a second to respond, I’d really appreciate it, but don’t feel pressured to if you don’t have the time.”*

No further action required.