



CLIENT ADVOCATE NETWORK

Connecting CAPITAL, PEOPLE & KNOWLEDGE

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July 21, 2010

Mr. William Kaley
President | CEO
Colony West Insurance
1855 West Katella Ave #325
Orange, CA 92867

RE: Results of Client Satisfaction Survey

First, I commend you for commissioning a survey of your clients. Far too often, businesses lose sight of one of their greatest assets – their existing clients. Business growth only happens when you are able to keep your clients and this starts with knowing what they think about you. Thank you for giving us the opportunity to serve you on this project.

SURVEY PROCESS

A randomly selected sampling of Colony West clients were contacted by US mail with a letter written by you and included a 2-page survey. Clients were informed that this survey was completely anonymous and that their responses were confidential. Clients were further instructed to fax completed surveys to me as opposed your office.

Over a period of time, 22 completed surveys were received. Below is a recap of the results.

RESULTS

Question – How did you become a client?

50% of respondents became clients as a result of direct calling efforts of your producers. 36% were referred by existing clients and professional friends. The remainder of respondents either replied to a marketing call or sought you out for a bid.

This tells me that your people are key to relationship with your clients and that your professional service friends and clients think highly of you to actually refer clients.

Question – What made you choose Colony West?

Respondents chose Colony West primary because of Price, then People and then Service. This is a pretty common result for new clients.

Question – What keeps you a client?

Respondents chose Colony West primary because of Price, then People and then Service. The reasons why clients chose you were the same reasons why they stayed with you.

It is interesting to note that the percentage sighting Price went down and the percentages sighting People and Service went up. This tells me you deliver on your promise and that you have begun to form a relationship with your clients.

Rating (4 – Excellent | 3 – Good | 2 – Fair | 1 – Poor)

Attention Received – 3.23

Knowledge of Risk Management – 3.27

Responsiveness – 3.36

Proactive Planning – 3.05

Understanding My Business – 3.05

Professionalism – 3.41

Care – 3.32

Value – 3.32

Overall Rating – 3.41

Overall, the ratings were above average. The key areas for improvement would be “Understanding my Business” and “Proactive Planning”. This is a positive thing – this means your clients want you involved and that they want you to be an advisor and not just a vendor.

Question – Would you recommend us?

95% of respondents said yes. Only one, a client who recently left Colony West, indicated that they would not recommend Colony West.

This is the acid test question on the survey. When clients are happy, then they will refer. If they are only satisfied, they will not.

Thank you again for allowing us to serve you by conducting this survey with your clients. I hope you use these results to build upon a good relationship and turn them into a great relationship with your clients.

If we can be of further assistance and value to you, please do not hesitate to call upon us.

Sincerely,

A handwritten signature in black ink, appearing to read "Greg S. Arbues". The signature is fluid and cursive, with the first name "Greg" being the most prominent.

Greg S. Arbues
Founder | President | Chief Client Advocate
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