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 short online 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. The survey is very concise, so it will only take you a few minutes. 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 short 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.