Client Value Survey

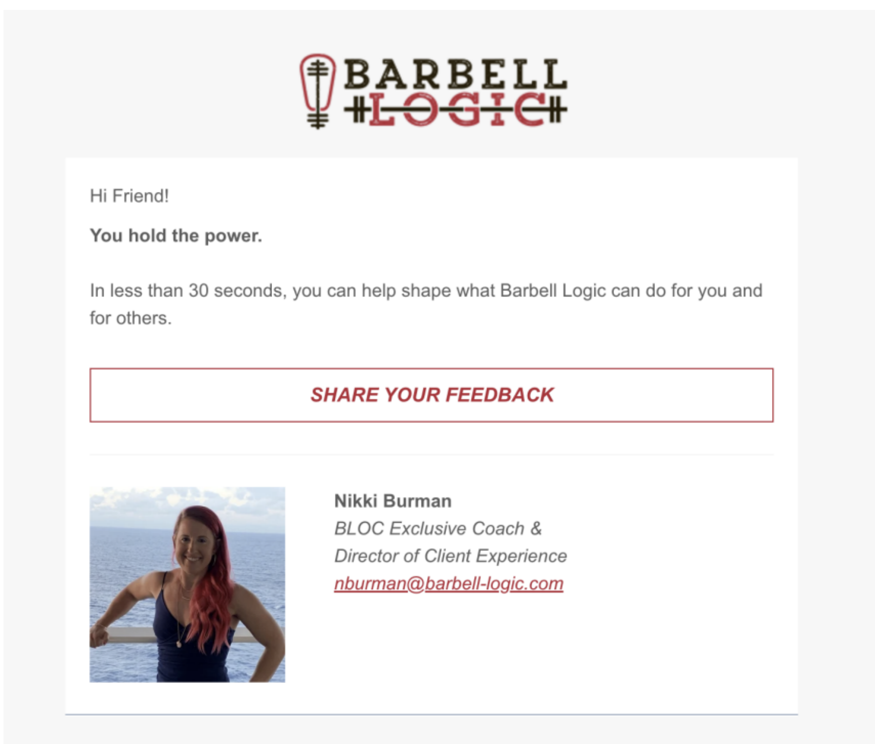
For many business owners, especially newer coaches, collecting feedback via a survey feels too formal and impersonal, but it's one of the most powerful tools we have for starting conversations, improving as coaches, generating testimonials, and building great customer relationships.

Here is the process we recommend for getting great routine feedback:

1. Send the Form

Whether you coach online or use a hybrid approach, it helps to warn the client in advance that the survey is coming so they recognize it and don't delete it outright.

Keep it simple: our most effective survey email starts with the subject line, "There is no wrong answer." It has only two questions and looks like this.



There are two particularly important stages to collect feedback: shortly after the client has signed on, and routinely through the coaching relationship.

That first stage of coaching, from onboarding to month three, is where most clients quit. This is where they are at their most uncertain, and any friction or confusion in the onboarding process can cause them to lose trust in the process. At BLOC, we send a Customer Effort Survey (CES) quickly—within the first week— to identify these friction points while they're still fresh on the client's mind. And if your client stays and benefits from the coaching relationship, these answers form the initial chapter in their coaching journey: the anxieties and hesitations they overcame and solved with your help to live a life of strength. Feel free to use our survey by copying it to a Google account and using it for your own.

At least every 6 months, we recommend sending a routine check-in. We've found an exceptionally simple Net Promoter Score (NPS) survey to be highly effective. Click this link to access a version of our form for yourself. It will automatically direct clients to the right question based on how they respond to the first.

We recommend you adapt both surveys to your own branding and personal style.

2. Start the Conversation

When feedback forms feel impersonal, it's usually because the coach sends the form, collects the feedback, and files it in a drawer somewhere. This next part is critical:

Ask your client about what they said.

Good or bad, use what they said as a jumping-off point for a conversation. Open by thanking them for their response. Then, ask them if they could clarify what they mean or provide specific examples.

People are more likely to fill out a survey for a negative experience than a positive one. And it's also easy to feel quite defensive about negative feedback.

But remember, every bit of feedback you get is a gem.

It is a nugget of information that lets you know what is important to your clients, and what is not. So, don't get stuck on the negative reviews, follow up on the positive ones, too.

Stay curious, and you'll often be amazed at the insights clients can provide.

3. Take Action

This is the most critical step. When you get detailed feedback and have an idea of what could be better, prioritize it, and if appropriate, incorporate it in a way that *meaningfully changes your practice.*

We are *used* to having our feedback ignored by faceless organizations and customer service reps who serve a company's interests over the customer's.

You build enormous trust with clients when they see their feedback taken seriously and acted on. So make it a high priority. Let them know you appreciate what they said and how they helped you improve as a coach.

If you truly *care* enough about your quality of service and what keeps your clients successful and happy, you're well on the path to becoming a 5X coach.

4. Prioritizing Feedback

Before you try to change your business model for every bit of negative feedback you get, prioritize changes based on the quantity of feedback about a certain area, ease of implementation to the change (considering time and resources), and if it aligns with your values and vision.

Sometimes a service or feature doesn't need to be changed, but rather the communication around the service or feature does. A negative experience may indicate that client *expectations* aren't aligning with the experience, and changing how you communicate expectations may be easier and more effective than remodeling the service or feature.

Over time, it will be helpful to monitor your client's experience and willingness to share it using the standard NPS Score like in the above survey. Keep your eyes on this score and make incremental changes to increase it.

Remember, though, that a score isn't everything. Some people will always ignore this survey. It's one tool among many that can be used to collect feedback, which can then be responded to, prioritized and acted upon as you see fit.

This is how you can truly center the client without sacrificing your own core values.