

Seeing (and Feeling) Things from the Client's Point of View

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*This time we hear from **Marnie Aznar of Aznar Financial Advisors** in Morris Plains, N.J. She recalls how a simple survey question helped her start seeing things more from her clients' perspective.*

Ever since I began seeing clients, it's been important to me to find ways to solicit honest and helpful feedback. For many years, I used to send clients an annual survey form to fill out. One year, I learned something that made me very grateful I had done so.

The survey I asked clients to fill out was pretty short and simple. I asked a few specific questions about my advisory services to get a sense of what was going well and what could be improved.

I also included a few more open-ended questions. This is important because people have a tendency to just answer the question you ask them. They might have an issue or something they want to address — but if you don't directly ask for it, they won't volunteer it.

I concluded my survey with a question like, "Is there any other way I could improve your experience as my client?" It was broad enough that clients felt encouraged to open up about anything and everything that came to mind.

About eight years ago, a long-term client had a surprising answer to that last question. She told me that my office chairs were extremely uncomfortable. I was shocked when I read that response. I had no idea — because, of course, I always sat on my side of the desk, where I had a very comfortable office chair.



As soon as I read her complaint, I tested out the chairs on the other side of the desk. While they looked nice and were fine to sit in for a few minutes, I could easily see how they'd start to feel much less comfortable during a long meeting.

I immediately went out to the office-supply store to test out new chairs. This time, instead of opting for ones that looked good, I made sure to try them out myself. I sat in half a dozen chairs before I picked out new ones. They probably cost five times as much as the ones I'd just gotten rid of — but if they made my clients feel more comfortable and at ease during a long meeting, then it was money well spent.

Over the next few months, several clients commented on the new, comfortable chairs. "I'm so glad you got rid of those other ones," more than one person said. And I'd had no idea they were such an issue!

To me, this isn't just a story about a chair. It's about looking at things from the client's perspective.

As advisors, we should make sure we're thinking about what our clients experience when they walk through the door to our office. Asking clients to fill out surveys is another way to ensure that you have a sense of what they're thinking and feeling. Some people might feel more comfortable writing down a constructive criticism than telling it to you in person.

It's also important to make sure your clients know that you really do want to hear helpful feedback, and that you're not just looking for them to tell you that everything is fine when it isn't. It never hurts to ask — you won't know what your clients are really thinking until you do.