



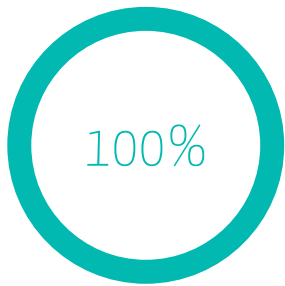
CLIENT SURVEY RESULTS

Consolid8 Client Satisfaction Survey March 2015

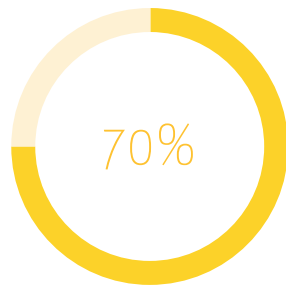
SUMMARY

The purpose of this survey was to gain a better understanding of what services you want from Consolid8 and to gauge your level of satisfaction with our service. We will use this information to provide more training and education in the areas you've requested and improve our methods of communication. We will conduct this survey again in 12 months to measure our progress.

THE GOOD NEWS



100% of clients were satisfied or very satisfied with our service



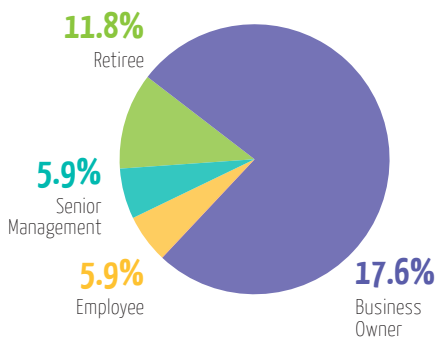
70% of clients value the trusted relationship they have with Consolid8

WHAT WE CAN IMPROVE

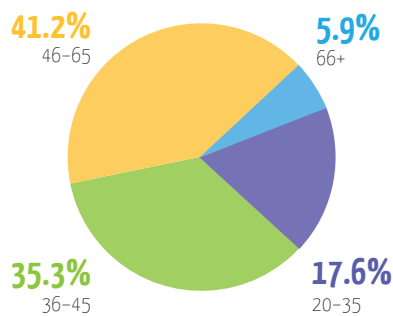
- Better communication – more phone calls/meetings
- Use technology to create more efficient process
- Provide more education and training

“ You feel we are good at providing technical expertise, excellent service and proactive solutions to business problems. ”

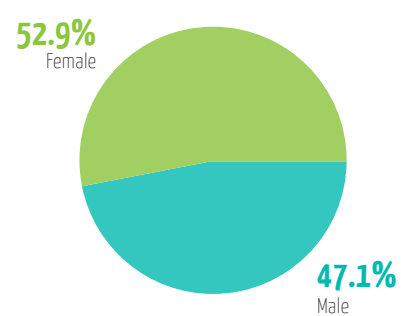
RESPONDENT DEMOGRAPHICS



Client Type

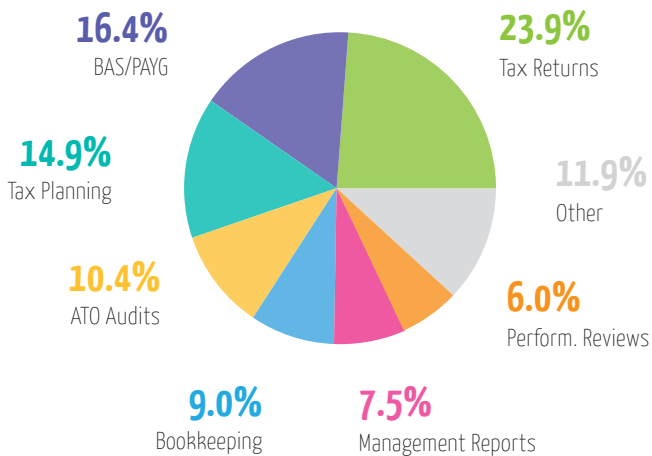


Client Age



Client Gender

SERVICES CURRENTLY USED



ADDITIONAL SERVICES YOU WANT



Estate Planning



Strategy Sessions



Business Advice



Investment Advice



Benchmarking



Software Training

CLIENT EVENTS

All respondents are interested in attending client events, during the afternoon or evening. Most clients prefer group presentations either in our office or a mutually convenient location

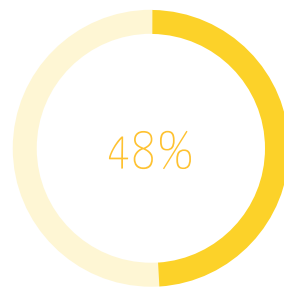
Interestingly, 28% of respondents are happy to participate in webinars. We will explore this option.

Most popular topics for education presentations were:

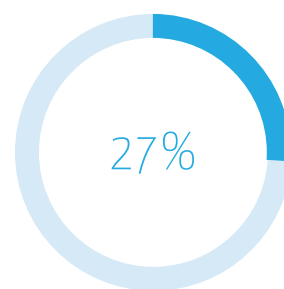
- Tax optimisation strategies
- Cashflow improvement strategies
- Business valuations



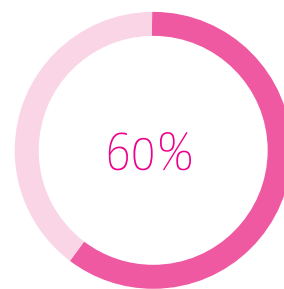
COMMUNICATION



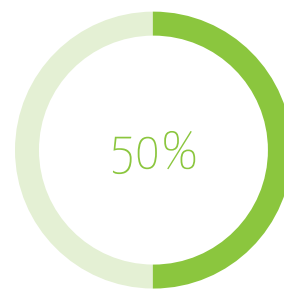
48% of clients prefer Consolid8 to communicate with them via email



27% of clients prefer Consolid8 to communicate with them via phone



60% of clients prefer Consolid8 to communicate with them monthly



50% of clients engage with Consolid8 on one or more social media platforms

BIGGEST CHALLENGE FACING CLIENTS



*Next client survey: July 2015
Topic: Business Confidence*