



**WINMORE  
PLANS**  
HEALTH + WEALTH  
RESEARCH & CONSULTING

# Client Satisfaction Study



Our 30+ years of retirement plan experience helps us ask participating clients only the most relevant and insightful questions.

## WHAT'S DIFFERENT?

**Qualitative  
Client  
Interviews**

## Plan Sponsor Engagement

Business leaders are more inclined to offer constructive feedback when speaking with an independent party because they:

- 1 Know their responses are confidential.
- 2 Trust how the information will be used.
- 3 Recognize what they will receive for their time and opinions.
- 4 Feel trusted, respected, and valued during the conversation.

## WE DELIVER...

Plan sponsors appreciate a high-touch conversational approach to giving candid feedback about working with your team. Our experience helps us dig deep to uncover the things you need to know.



## PROJECT STEPS

Trends identified during interviews help us develop a short, customized client survey for a broader selection of your book of business.

### Quantitative Survey



## CONTACT

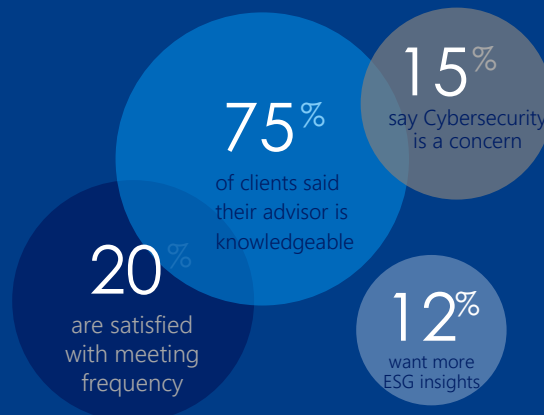
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## EXAMPLE RESULTS



## SKILLS

