



Insurance Policyholder Experience Survey Checklist

Initial Contact & Quote Process

Assesses the ease and clarity of the initial interaction and obtaining a quote.

How did you first hear about us?

- ☐ Online Advertisement
- ☐ Referral from Friend/Family
- ☐ Social Media
- ☐ Search Engine (Google, etc.)
- ☐ Other

How long did it take to receive an initial quote?

Enter a number...

How easy was it to find the information you needed on our website/app?

- ☐ Very Easy
- ☐ Easy
- ☐ Neutral
- ☐ Difficult
- ☐ Very Difficult

Please describe any difficulties you encountered during the initial contact or quote process.