CONSUMER DUTY: DOCUMENT TESTING

Repeatable email surveys to key groups of customers to ascertain consumer understanding of standard documentation

- **Ad hoc surveys sent to a targeted group of clients, asking them to review a document, comment on and score documentation**
- **Secure data management**
- **Fully managed design, survey delivery and analysis**
- **Online portal to access results in real time**
- **Advise and recommendations from CX professionals**
- **Repeatable surveying for <u>ongoing measurement</u> if required**

CONSUMER DUTY DOCUMENT TESTING

HOW IT WORKS

- Documents for testing agreed upon and pdf's shared

- Warm-up comms and survey invite wording agreed

- Data selected & securely shared

- Warm up comms sent out by client, opt outs removed

- Initial survey invites & reminders sent over 2 week period

- Dashboard provides real time response numbers & downloadable spreadsheet with response data

- Full report with recommendations presented

ACTIONABLE INSIGHTS
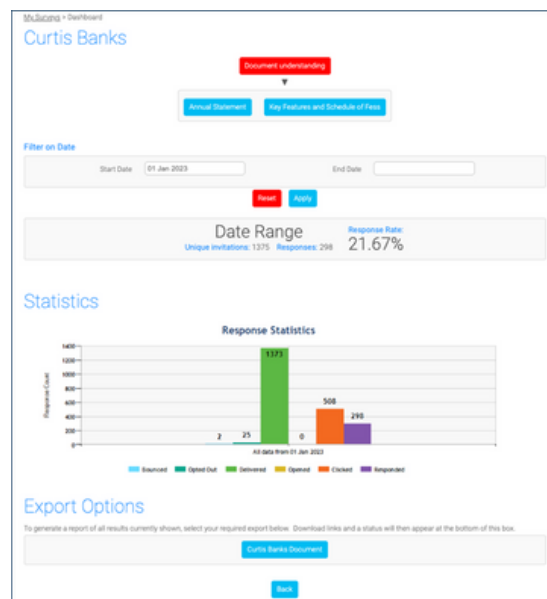
INDEPENDENT VERIFICATION

Investor in Customers provides **independent verification and benchmarking** to support the **evidence** you provide to the FCA.

You can also upgrade to a full **IIC award** by adding additional questions related to IIC's unique methodology and assessing how well your employees understand their role in delivering acceptable outcomes to your customers, and a **customer experience** that will delight them.
Contact us for more information

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