

CREATIVE PENSION CONSULTANTS, INC.

We've recently been part of an industry-wide survey to find out what our clients think of us. We had the survey sent to almost 400 of our clients, selected at random.

First of all, thank you to all those who got the survey and responded. Most firms had a response rate of 10%; we got a response rate of 25%, which tells us how much you wanted to share your experiences.

The scores were based on the numerical answers to statements like, "My TPA's staff is polite and professional," or "My plan design meets my needs," where 1 was strongly disagreeing, and 7 was total agreement. There were 25 statements overall.

Our results were pretty good. On a seven-point scale, we scored an average of six or above in every category, and most were above 6.3. We were at or above the average of the entire survey in every category but two of the 25. We'll talk more about those in a second.

Overall, we're pleased with the results. We like to think that we provide excellent service as well as top-notch technical know-how, and it's great that you, our clients, recognize that.

That being said, we see that we can do better. We think we're a great service provider, not 'slightly above average', so we have to focus on getting our message out a little faster, a little clearer, a little better.

Most obviously, that needs to happen in the two categories we were weakest in, which related to our website access and functionality. As you can see, we've done some upgrading to our webpage so you can see some of the people you work with every day, and also have pictures to let you put faces to the names and voices. We've changed our web portal to one that should work smoother, too – that portal is becoming an important part of our business, for speedier delivery, for on-line security, and to keep important information available. It shouldn't be something you dread using.

We want to show you why you chose to work with us – our knowledge, our service, our relationship, and our ability to look at things from your point of view. We're a partner in this small part of the successful running of your business, and we hope that you continue seeing us that way.

You Run Your Business, Let Us Run Your 401(k) Plan

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