



Survey Form

Personal Details:

Name:.....
Date of Birth/Age: Occupation:..... Education
Your Monthly IncomeYour Monthly Family Income.....
Cell No:..... E-mail ID:.....

Survey Questions:

1. Do you have any LIC Policy? Yes/ No.
2. If No, please give specific reason for not taking any LIC policy:
a) No agent has approached b) Don't believe in life Insurance
c) Not Insurable d) Can't afford the premium
e) Any other reason
3. If Yes:
a) No. of Policies: b) Sum Assured..... c) Annual premium:.....
4. What prompted you to buy above policies?
a) Suggested by relative/ friend. b) Just to oblige the agent/ Bank Manager.
c) Advertisement. d) Advised by Tax consultant/CA.
e) Need analysis done by the agent.
5. How do you pay your Premiums?
a) Collected by Agent b) Through ECS/ Salary
c) Through Net Banking d) By Self at LIC office/ Collection Centre.
6. Are you aware of other services required under your policies? Yes/ No.
e.g. Age admission/ Change of address/ Nomination/ Assignment/ Reassignment/
Revivals/ Survival Benefit/ Alterations in mode, plan and term etc.
7. Have you visited any LIC Branch for any services related to your policies? Yes/ No.
8. How do you rate LIC's servicing? Poor/ Good/ Very Good/ Excellent.
9. How do you rate services of your Agent? Poor/ Good/ Very Good/ Excellent.
10. When were you last approached by an LIC agent?
a) During last six months b) Between six months to one year
c) Between one to two years d) More then two years before.
11. Which of the following needs you consider as most important for you? (Select only one)
a) Family Income Provision b) Children Education and Marriage Provision
c) Retirement Provision d) Collateral Security for Loans.
e) Wealth Creation f) Tax Saving
12. Do you know about Human Life Value and Capital Need Analysis? Yes/ No.
13. If No, would you like our representative to call you and explain the same? Yes/ No.
14. Your valuable suggestions:.....
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