

Recruiting survey v2: understand business challenges



Editorial illustration. | September 2026 edition

A short survey can help a brokerage understand the support agents want. State who is asking and why before collecting answers. If a recruiting invitation may follow, make that purpose clear instead of introducing it at the end as a surprise.

This illustrative version focuses on business challenges. It is a conversation guide, not a validated research instrument or a representative market study. Use an approved contact process, accept skipped questions and do not collect client details or other confidential information.

Disclose the sponsor and purpose

“Hi [name], I’m [your name] with [company]. We’re asking agents about the support that would be useful in their businesses as we review our own offering. I also work on recruiting, and may ask whether a separate conversation about our company interests you. Taking part doesn’t require that conversation. Would you be willing to answer a few questions?”

Explain how you intend to use the answers and whether you will record them. Do not promise anonymity or a report unless you can deliver it. If the person declines, thank them and stop.

Ask about the work

1. What part of running your business currently takes more effort than you would like?
2. What happens when that work gets delayed or interrupted?
3. What support have you already tried, and what was useful about it?
4. If you could improve one part of your working arrangement, which would you choose?
5. What would you want to see before deciding that a new service or support option was useful?

Use a neutral follow-up such as “Could you give an example without identifying a client?” Let the answer stand even if it does not fit your company's offering. Avoid steering every response toward a benefit you want to pitch.

Keep an invitation separate

Finish the questions before asking about a recruiting discussion. Reflect the actual answer accurately and describe only support that exists.

“Thank you. You mentioned [stated need]. Our current offering includes [verified relevant support]. Would you like a separate conversation about how it works, or would you prefer to leave it here?”

A refusal does not invalidate the person's answers. If they accept, agree on the next step and preferred channel. If you genuinely plan to share a summary, explain what it will contain and ask whether they want it. Do not treat that request as permission for unrelated marketing.

Record the number and context of responses before drawing conclusions. A small voluntary conversation sample describes those respondents; it does not establish what all agents in a market believe. The [brokerage-fit version](#) covers working-arrangement preferences.

To connect what you hear from agents to practical changes in your business, [Talk through your next move](#).

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