

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

# USING YOUR NPS CAMPAIGN TO POWER YOUR BUSINESS



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NPS stands for **Net Promoter Score** which is a metric used in customer experience programs. NPS measures the loyalty of customers to a company. NPS scores are measured with a single question survey and reported with a number from -100 to +100, a higher score is desirable.

NPS IS *STILL* A HELPFUL  
MECHANISM FOR  
COLLECTING FEEDBACK.

# WHAT NPS IS AND IS NOT?



Helpful mechanism to collect customer feedback



Great way to engage disengaged customers



Provides validation and direction on efforts to prioritize



Not a performance metrics to measure the impact of your CSMs



Not a benchmark of customer health or renewal intention



Not a metric your should be chasing

# SETTING THE RIGHT EXPECTATIONS

## KICKOFF DISCUSSION

Introduce your survey strategy at the start of the partnership. Let them know what you expect.



1

## ADD IT TO THE AGENDA

Encourage your team to mention the upcoming survey during their regular customer discussions.



3

2



## REMINDERS

Send an email reminder to your customers in advance of the survey. Let them know it's going out and that you want to hear back.

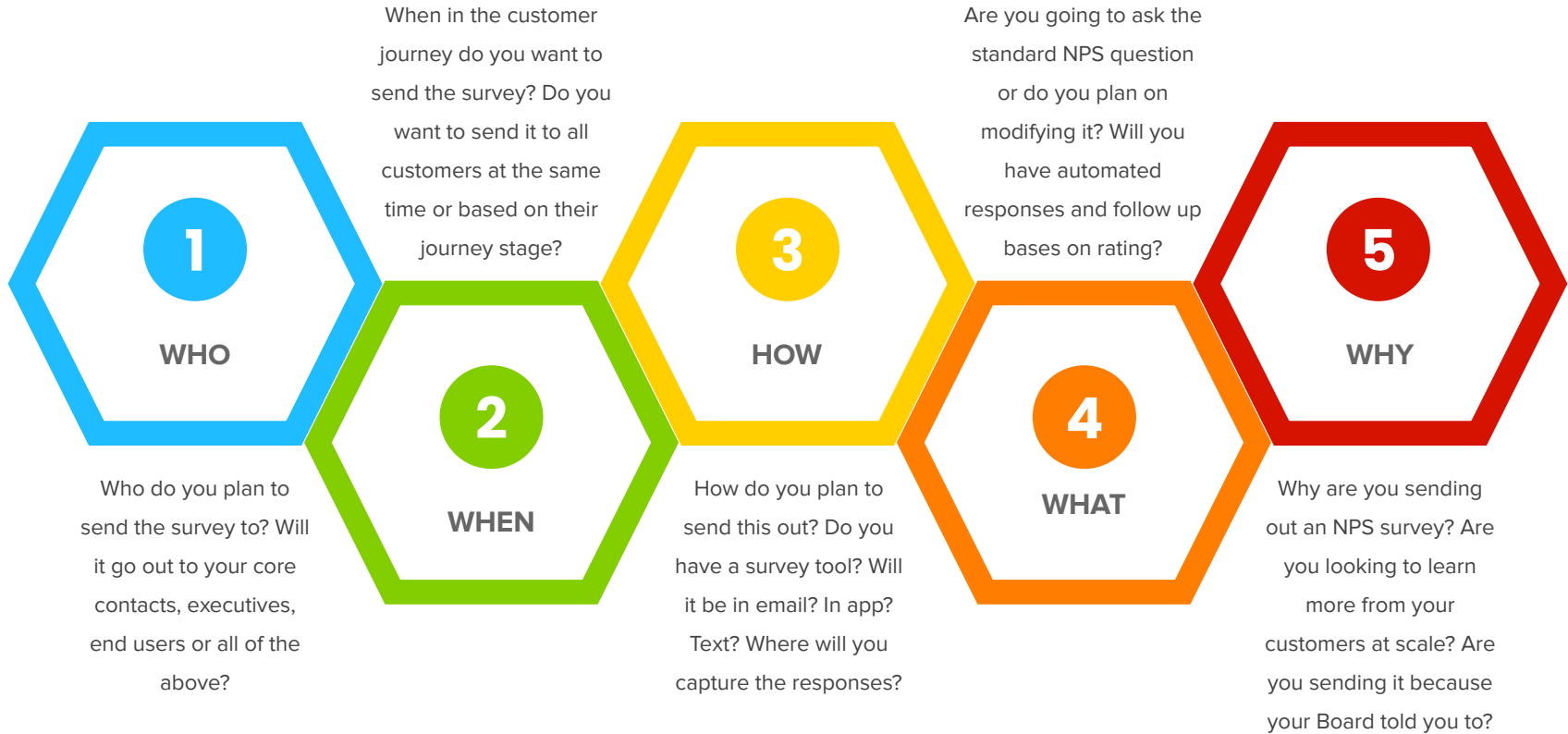
4



## INSTRUCTIONS

Let your customers know how you are going to use the data and how it will benefit them. Make it all about them and the value.

# GETTING STARTED WITH NPS



# NPS EXECUTION PLAN

START

1

Notify your internal that an NPS survey will be kicked off and let them know when so they can help promote it and are ready for responses.

2

Determine the contacts to receive the survey. Make sure to exclude customers who should not receive it based on your program criteria.

3

Build your campaign to run ensuring the right questions and automated responses. Include logic as needed.

4

Send your campaign and watch responses come in.

8

Send a final follow up to anyone who has not responded to the survey. Anticipate that responses will trickle in.

7

Start reaching out to customers to discuss their feedback - promoters, passives and detractors alike.

6

Follow up to get sent out to any persons who have not yet responded.

5

Assign internal employees responsible for responding as feedback is collected.

9

Send an email to all recipients, agnostic of response, and thank them for the feedback and let them know what's next.

10

Analyze all of the comments provided in the survey and all of the notes captured from conversations and email.

11

Share all of the data and learnings to the entire company. Encourage every employee to read it.

1  
2

Follow up with an email to your customers letting them know what you learned with this effort and what you plan to continuing doing and what changes you'll make.

END

# PUTTING NPS TO WORK



## ADVOCACY PROGRAMS

Leveraging your promoters, identify customers who are willing to be a reference, collaborate on a case study, speak at an event etc.

## REVENUE DRIVER

Leverage your promoters to identify early renewals, lock in early commitments, find upsell and growth opportunities.

## MITIGATE RISK

Embrace your detractors. Connect with them live to discuss their challenges and feedback. Collaborate on a “get well” plan.

## PRODUCT ROADMAP

Look for product themes in the comments and from discussions. What do customers want and need and map it out.

## BENCHMARKS

Don't put a lot of weight on the score BUT use this as a benchmark and compare it to your past and future scores. Are we improving over time?



# DATA SEGMENTS TO REVIEW

## NPS SCORE BY SEGMENT

As you parse through the NPS scores and comments segment by your customer segments. If you have limited bandwidth target your efforts where it might make the most impact.

## NPS BY ROLE TYPE

Break down your data by contact role type - How do your Executive Sponsors perceive the partnership compared to your end users? Uncover new initiatives to improve engagement and enablement.



## NPS BY RENEWAL DATE

Review the scores correlated to upcoming renewals. Customers renewing in the next 90 and 120 days - how do they feel about the partnership?

## NPS SCORE CHANGE

If this is someone who has given feedback before, has their sentiment improved, moved backward or stayed the same? If it's moved up or down, now is a great time to figure out what's changed and how to get it back on track.

# INSIGHTS TO CONSIDER

**RESPONSE RATE**



**% OF  
CUSTOMERS  
WITH A SCORE**



**% OF  
RESPONSES WITH  
COMMENTS**



**MECHANISM  
PERFORMANCE  
RATE**



# 5 NPS MISTAKES TO AVOID

**1.**

**ASKING TOO  
SOON OR TOO  
LATE**

**2.**

**FOCUSING  
ON  
DETRACTOR  
RESPONSES  
ONLY**

**3.**

**NO FOLLOW  
UP OR NOT  
CLOSING THE  
LOOP**

**4.**

**KEEPING THE  
SURVEY  
RESULTS TO  
YOURSELF**

**5.**

**SENDING  
THE SURVEY  
TOO OFTEN**

THANK YOU