The

# MODERN GUIDE
# TO WINNING CUSTOMERS
## with NET PROMOTER SCORE[SM]

## 8 Ways to Modernize Your NPS® Program and Create a Culture of Customer Happiness

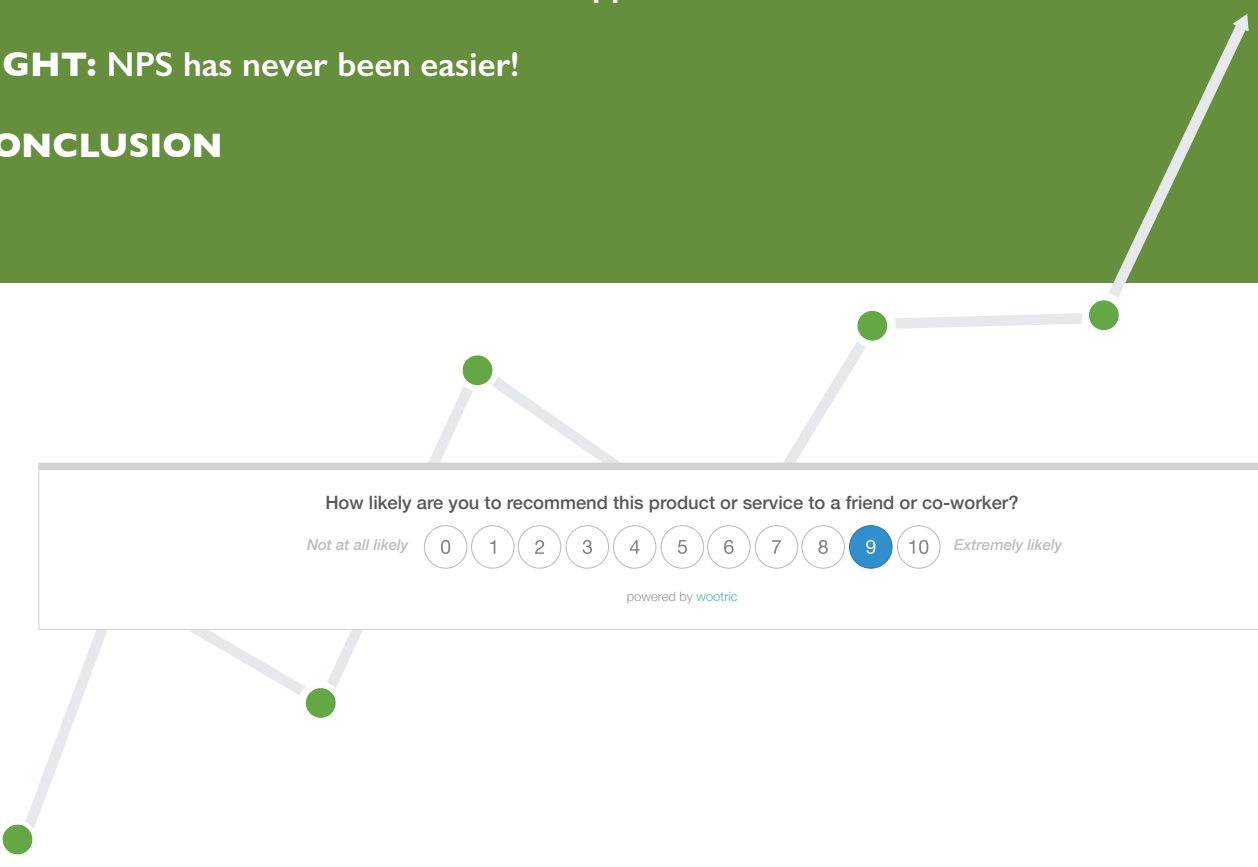"Optimizing the Customer Experience typically achieve[s] revenue growth of 5–10% ... in just two to three years."

*Source: McKinsey & Co.*

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How likely are you to recommend this product or service to a friend or co-worker?

Not at all likely   0  1  2  3  4  5  6  7  8  9  10   Extremely likely

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INTRODUCTION

# WHAT IS MODERN NPS?

The Buyer-Seller Relationship Has Changed. Net Promoter Score Has Too.

The Net Promoter Score system was originally created to do one thing: Generate growth through customer satisfaction. But today, satisfaction isn't enough to compete in the global marketplace.

Today's customers expect ongoing experiences of value, happiness, and success. It's a tall order, and to achieve it, the fastest growing businesses are learning to anticipate, listen, and respond almost immediately to their needs. And, with competitors coming out of the woodwork, companies have to deliver these results consistently, over and over again, to win loyalty and earn true promoters.

We think there has never been a better time to ask that all-important question:

*How likely are you to recommend this product/service?*

## Net Promoter Score has evolved to meet these challenges.

NPS has become both a must-have C-suite metric -- more than two-thirds of the Fortune 100 use it -- and a system to drive improvements in customer experience, retention, repeat sales and growth. Modern NPS programs automate the admin and analysis so you can focus on insight and action. Now businesses of all sizes can leverage this powerful metric.

**If you're launching your NPS program for the first time or refreshing your approach, we'll show you how to improve your NPS program for the most successful year ever. Read on!**

- **JESSICA PFEIFER, Chief Customer Officer and Co-founder of Wootric.**

Jessica has onboarded and advised hundreds of companies on effective use of the Net Promoter System to boost customer happiness. An expert on online business success, Jessica holds a BA from Yale University and an MBA from Harvard Business School.

**Could you benefit from modernizing your NPS program? If you answer yes to any of these…then, YES!**

- You're still doing NPS calculations in Excel.

- You wish your data was neatly compiled in a business insights tool.

- You've been uploading customer lists every week.

- You have to "gear up" for NPS campaigns.

- You are having trouble getting anyone to care about NPS, and/or you are the only one looking at NPS data.

- You spend more time on NPS admin than acting on customer responses and insights.

# REAL-TIME NPS FOR REAL SALES AND RETENTION

Gone are the days of gearing up for a quarterly Net Promoter Survey campaign -- and hoping that enough customers open the email and respond.

Modern NPS is no longer a once-in-while check-in, but rather an ongoing way to track customer health and leverage that information for real improvements.

Today's successful companies listen to their customers in real-time with drip NPS. In the early days of NPS, the survey was sent out in a bulk email to all customers -- perhaps quarterly or annually. Today, that's too little, too late. Drip NPS is a more agile approach that suits rapidly evolving products and services.

With real-time results:

- You'll never miss a trend.

- Responding to customers is more manageable.

- You can reach out to detractors to address any issues in a timely way.

- It is easier to correlate changes in NPS with business milestones.

## How to do it

There really isn't a shortcut here! Instead of sending a mass email campaign to 100% of your customer base once a quarter or once each year, find an NPS platform that can automatically send surveys to a few customers each day so that you reach out to everyone over the course of a quarter or year. You should be able to instantly track your up-to-date NPS score with very little effort.

**Drip NPS: Surveys constantly go out to small samples of users, giving you instant access to how well you're serving your customers today.**

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# REDUCE FRICTION FOR HIGHER RESPONSE RATES

One of the founding goals of NPS is to improve customer experience, which means the survey and post-survey outreach can't be intrusive. With the help of a few tools and a little strategy, you can create a beautiful, low-friction experience customers genuinely appreciate. Your customers will reward you with high survey response rates.

## How to do it

**1. Liberate the inbox, whenever you can:** The inbox is sacred space, and every other company is all too willing to use and abuse their access to it. The increasing barrage of emails from businesses to customers hasn't increased open rates, but it has caused the vast majority of emails to be labeled as "Trash" -- or simply ignored.

When deciding whether to survey via email or with an in-app program, consider: What is the best way to ask customers for contextual feedback? Not the best way for you – the best way for *them.*

- **Go In-App:** Asking in-product is the lowest-friction way to conduct NPS surveys – we know this by the response rates. Why? People are often more willing to answer in-app surveys than to take time, and concentration, away from what they're doing to answer an email. And, your responses may be more accurate, since they won't have to try to reconstruct what they were doing in your app three days ago – they're doing it now.

**LOW FRICTION = HIGH RESPONSE**

In-app NPS surveys typically garner response rates of 25%-60%

Source: Wootric customer data

## Two Step In-App NPS Survey



How likely are you to recommend this product to a friend or colleague?

Not at all likely  0  1  2  3  4  5  6  7  8  9  10  Extremely likely

Thank you for your response.

Not at all likely  0  1  2  3  4  5  **6**  7  8  9  10  Extremely likely

Help us by explaining your score...                    SEND

- **Go Email:** If your customers or key decision-makers are rarely online using your product, service or website directly. In this case, they won't have the opportunity to see an in-app message, so sending them an email is your best bet.

2. **Survey your customer at the right time in their lifecycle–and not too often.** For example, send their first survey after they've had enough time to experience and understand your product or service. It can be tempting to ask the NPS question frequently. If your offering is evolving rapidly, quarterly may be fine. If not, consider asking only once or twice a year. A modern NPS platform should automate this for you.

3. **Keep it simple.** Resist the temptation to ask more than the NPS question. Additional questions reduce response rates and can irritate customers. And, if a customer tells you why they rated you a 3 or a 10, really, what more do you need to know in that moment? You can always follow up and ask for more detail.

**In the age of survey fatigue, the key to better response rates – and more accurate measurement – is to create a better experience for your customers.**

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**PRAISE FOR MODERN NPS**

# "We went from being crazy town to finally having a stable NPS and solid feedback while cutting out a ton of manual work! Less work, more results!"

— Retail software company

# ALIGN & OPTIMIZE EVERY FUNCTION THAT IMPACTS THE CUSTOMER

In the early days of NPS, it was all about getting the score: What is our NPS? How does it compare to our competitor's score? What's our industry benchmark?

Today, we see modern NPS as a powerful system for optimizing every function that impacts the customer. Let's take Product Development, Marketing, Customer Service/Support, Customer Success and Sales as examples.

**Product Development:** NPS can help you prioritize dev resources by making it easy to track feedback related to your core product, like requests for new features and suggestions for improvements. You'll also want to keep tabs on feedback about IT issues like uptime and speed.

**Marketing:** NPS can be used to identify and leverage promoters. By finding out which customers are achieving the greatest results, marketing can then contact those clients to become part of advocacy programs, or to request information for case studies.

**Customer Service and/or Support:** NPS can act as a signal for support outreach to improve retention.

**Customer Success:** NPS is vital. By proactively measuring customer health, you will have fewer surprises. Follow up on a low NPS score immediately to prevent churn. If your business doesn't have a customer success department, consider having sales step in.

**Sales:** Which accounts are primed for upsell? Who might provide a referral? Who might be in trouble? For the sales team, NPS is about business intelligence.

**→ LEARN MORE**

**Read How Magoosh's product development team A/B tests for customer happiness**

## Cross-functional Alignment

When managers take the lead to form cohesive, customer-centric, interdepartmental teams that incorporate NPS data into everyone's existing workflow, it not only facilitates learning and accountability throughout the whole company, it can even change company culture for the better.

## How to do it

- Identify an NPS champion within each function.

- Set up integrations with CRMs and customer support platforms like ZenDesk, Salesforce or Intercom to ensure data gets into everyone's workflow. It's a powerful way to reduce the number of meetings.

- Classify and tag open-ended feedback and route to relevant stakeholders. Tagging enhances your analytics, clarifies cross-functional follow-up, and drives immediate action. Modern NPS platforms enable you to do this with ease.

- Bring your champions together on a quarterly basis to discuss customer happiness and your process for improving it: "How are we doing overall?" and "What do we need to refine as a company?"

**→ LEARN MORE**

**Read how to use Tagging to make the most of open-ended NPS feedback**

### In our experience, modern NPS programs achieve their best results when:

- They are used within the context of a customer success or support program.

- They inform every function from product development to marketing

- They become not just a tool, but a cultural movement towards customer happiness

# 3 WAYS TO SEND FOLLOW-UPS THAT BUILD LOYALTY

In the old days, "getting the score" was a big deal for management, resulting in many meetings and a few changes to how business was run. But for the customers, it meant nothing. They never heard back about their responses. Today's customers expect you to acknowledge them.

See response rates rise and customer delight increase – along with retention – when you respond to customers that give you feedback. Don't worry, it's not as time-intensive as you might think. And a modern NPS platform can help simplify and automate the process of closing the communication loop.

## How to do it

Here are three approaches that represent different levels of engagement. It is ok to take a hybrid approach, and most companies do. Think through what is right for your business -- the most important thing is that everyone's feedback is acknowledged.

1. **High touch:** A customer success agent or account manager for each account reach out to their customers each time they respond, even if just to say "Thanks!" This lets customers know you're listening and appreciate their feedback. You may also be able to coax out additional context for their feedback that can help make it even more actionable. For a B2B business, this is the way to go if you have the resources.

2. **Medium touch:** If you don't have the resources to personally contact everyone, segment the list by rating. Sync with a platform like Intercom to trigger automated messages, or schedule a weekly email campaign to each group.

   • Thank your **promoters** (and possibly offer an incentive for them to share your product)

   • Route responses from **detractors** to success or support. Devote time into finding out more about why they aren't happy, especially those that didn't leave any feedback.

   • Consider an automated message to **passives** that didn't leave feedback. The goal here is to engage in a "What would make you LOVE us?" conversation.

3. **Low touch:** Respond with information sharing and transparency. Consider writing a blog post or newsletter at the end of the month, summarizing the feedback you've received and stating your plans to address issues customers have raised. Show progress. This lets your customers know that you're listening, and that you have a plan to make their experiences better. This is a way to go if you don't have contact info for respondents and/or you lack the bandwidth for personal reach outs.

**→ LEARN MORE**

**Read how high touch follow-up reduces churn at a SaaS company.**

**Sometimes, follow-up is all it takes to turn an ambivalent customer into a raving fan.**

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# BUILD AN ARMY OF BRAND PROMOTERS

A customer who scores "very likely" to recommend your product or service is a hot ticket to a referral!

Taking advantage of this enthusiasm in the moment is one of the reasons why modern NPS programs are such powerful tools for growth. It is easy to ask happy customers to put their positive thoughts into positive action. In this age when prospects are researching their options before ever even contacting you, public validation by current customers is golden.

## How to do it

Trigger a communication, set to auto-deploy to anyone who rates you at 9 or above. Include one or more of the actions in the sidebar.

Here are three ways to automatically deliver the Call-To-Action:

• **Build a follow-up CTA into your in-app NPS survey.** This gets the highest response rates because the call to action appears on screen in your SaaS product, app or website immediately after a promoter responds to a survey.

**5 "Calls To Action" you can invite your customers to take when they score you a 9 or 10:**

1. Tweet to share your comment with one-click!

2. Like us on Facebook

3. Join our referral program (include a personal referral link)

4. Write a review on a software review site or app store

5. Volunteer to be a reference for new prospects
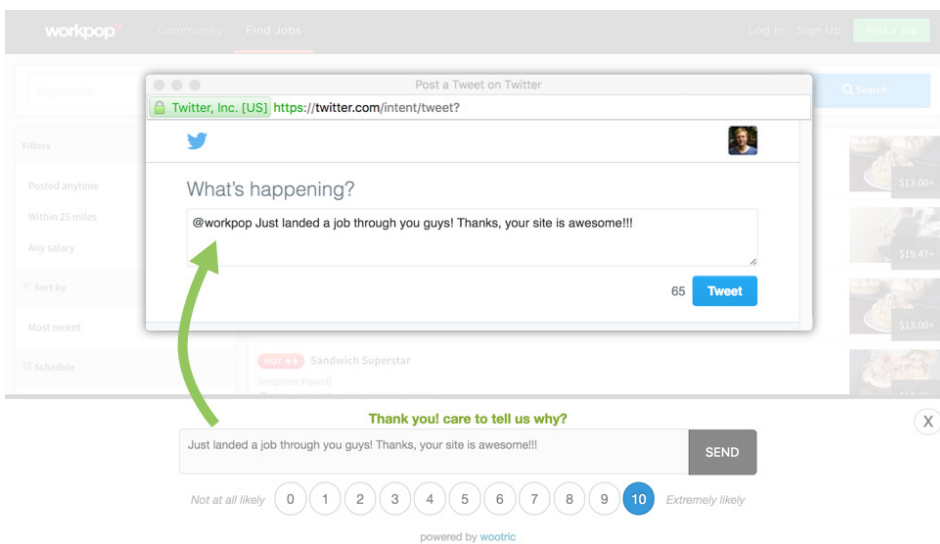
- **Customer conversation.** Use your NPS platform (or an app like Zapier) to trigger a message in Intercom or other customer communication platform.

- **Email.** If you are using email NPS, you can still deliver an action request by triggering a followup email to the promoter's in-box or use a platform to take a customer to a CTA screen directly after the survey.

**Modern NPS is a marketer's dream precisely because it is possible to reach out to promoters in the moment. In fact, it doesn't let a great moment pass.**

**15Five**

The employee engagement platform 15Five is one company that has built an army of brand promoters. They segment their customers by NPS score, so it is easy for them to identify and empower promoters. And, they pass NPS data to Intercom so their promoters can be instantly invited to join 15Five's brand advocacy program.

**"We love the ability to communicate with customers by NPS segment. We were featured on a major startup website a while back, and it was like I was commanding an army of promoters to spread the word and get people interested in reading the story. I started by notifying the 10s, then I sent in the 9s, then I unleashed the 8s…It was a extremely effective and incredibly fun."**

— **Shane Metcalf,** VP, Customer Success, 15Five

# SEGMENT NPS FOR BUSINESS INSIGHTS

By isolating NPS by segment, you'll be able to get a better picture of customer satisfaction and user experience so you can prioritize your challenge areas and deploy your resources efficiently.

Segmentation also lets you:

- Identify groups of users with different needs.
- Check whether all groups feel equally, or if your overall NPS is driven up by just one segment (or down by another).
- Allocate resources to improving your product or service for your most valuable customer segments.

## How to do it

With modern NPS, you should be able to segment by any characteristic shared by groups of users. Not sure where to start? We've noticed a few trends in how various business models prefer to analyze their data:

**Software as a Service (SaaS)**

- **Account level and customer longevity.** This is useful for Customer Success teams that need to monitor the health of accounts with multiple users. Problems can be quickly identified and proactively addressed to prevent churn.

**Marketplace**

- **User personas.** Segment marketplace customers into different buyer/seller personas to check user satisfaction for those different groups.

**E-commerce**

- **Stage of engagement or purchasing patterns.** Your NPS for customers who spend $100 a year might be very different from the NPS of customers who spend $1000; or you may notice high NPS scores for those who gravitate towards certain types of products.

**Website visitors**

- **Device, geographic location, browser.** While you don't have personal information for your NPS survey respondents, you still have information that may be useful to you. For example, what is your NPS for site visitors on mobile versus those that experience your site on their desktop?

→ **LEARN MORE**
**Check out the Wootric demo dashboard to see an example of SaaS business segmentation.**

**Segment NPS by your business drivers to better allocate your resources and attention.**

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# BUILD A CULTURE OF CUSTOMER HAPPINESSS

Perhaps the most compelling way successful companies use NPS today is to leverage it to create a culture of customer happiness.

A 2015 study by Deloitte asserts that such mission-driven companies have 30% higher levels of innovation, and 40% higher levels of employee retention. And their #1 suggested action for companies to build culture was to drive alignment.

NPS is a great rallying point to engage your entire workforce around the common goal of exceptional customer experience. What everyone needs to focus on is the trend. Are you improving? Is that number getting incrementally higher? Don't compare yourself to your competitors – your only competition is yourself.

## How to do it

Here are tactics leaders can use to build a customer-centric culture using NPS:

**Make NPS visible.**
- **Publish a weekly report** for the whole company to see. Include a few verbatim comments to make it clear that these responses come from real people – people who love your product, or don't. Sharing the NPS metric along with more traditional metrics like revenue or profits demonstrates that customer delight is central to your company mission.
- **Share NPS responses** into a Slack channel or on a screen in the office for real-time visibility of customer sentiment.

**Celebrate success!**
- For example, if NPS trends upward for 3 months in a row, take the time to acknowledge this milestone.
- Explain the "why" behind the score. Identify the action you took that influenced that trend and share it company-wide.
- Acknowledge the person or team that took the lead. In this way, everyone understands that the score is a result of hard work and consciously allocating resources to improve customer loyalty.

Remember, focus on incremental improvement and creating an upward trend, rather than getting "stuck on" the score or comparing your NPS to others in your industry.

**A good NPS score is one that is better than the last.**

**"Customer Experience is the top CEO investment to impact business in next 5 years"**

*Source: Gartner*

**Click for more ideas on building a customer-centric business.**

# NPS HAS NEVER BEEN EASIER!

Today NPS is simple to implement, analyze and share – with technology, set-up is guided and all of the most burdensome aspects of implementing an NPS program are automated. This means more time can be spent on drawing conclusions and taking action to boost customer happiness.

## Avoid survey overload

Modern NPS works within the context of the response history of your customer or site visitor. It can automate when, where, and how often to reach out, so no one gets surveyed too often. For example, if a customer completes a NPS survey on a company's mobile app they won't see it again on their computer.

## Analysis, automated

Tying responses to pertinent details about individual customers, like their pricing plan or purchase history, cohort, persona or location allows for slicing and dicing the data at will. No more Excel sheets!

- Track NPS over time by custom dates
- Track NPS by customer segment
- Track NPS by response category using tagging

## No more NPS "campaigns"

Identifying information, like email addresses, and other user properties can be captured automatically by your NPS platform. So, whether you are using "drip" or event-based NPS, you no longer have to manage lists of users offline.

The time you'll save and the benefits you gain far outweigh the costs of a good, comprehensive NPS platform.

### How easy is it?

✓ **Up and running in minutes.** A well designed platform should guide you through decisions and ensure smart set-up.

✓ **Survey across channels** -- mobile and web -- automatically.

✓ **Manual admin is minimized.** Gone are uploaded email lists, no more calculating NPS in Excel sheets. This means more time can be spent on drawing conclusions and taking action to boost customer happiness.

✓ **Data is integrated into every function's workflow.**

**With modern NPS, all of the most burdensome aspects of implementing an NPS program are automated, so you can take action faster.**

# CONCLUSION

The Net Promoter Score was created to generate growth through measuring and improving customer satisfaction. But today, satisfaction isn't enough to compete in the global marketplace.

**The customer relationship has changed.**

Incredible leaps in technology have allowed us to create and sell products and services online, which means that **your customers choose, over and over again, whether or not to use or purchase your product.**

Today, more than ever before, it's your job to create delight, happiness, and success for your customers. Only then will you see genuine customer loyalty, enthusiastic brand promoters, and the exponential growth that comes with them.

**Now Net Promoter Score can be the cornerstone of your strategy to win customers for life.**

The simple beauty of the Net Promoter Score is that it's a single number. When that number drives action, and it will propel customer loyalty and growth.

A modern NPS program can get you to action, faster.

## ABOUT WOOTRIC

Wootric is the Net Promoter Score platform for boosting customer happiness. Our simple, flexible platform gathers customer feedback in your web or mobile app. Align your team around customer experience, and analyze NPS data by business drivers that are meaningful to you. Easily close the loop with customers. It is our mission to help you win customers for life.

Learn more:
**https://wootric.com**
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