

NET PROMOTER SCORE SOFTWARE BUYER'S GUIDE

10 Questions to ask to make sure you buy
the best NPS software for your needs.



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ABOUT WOOTRIC

“Our conclusion: superior CX
drives superior revenue growth.”

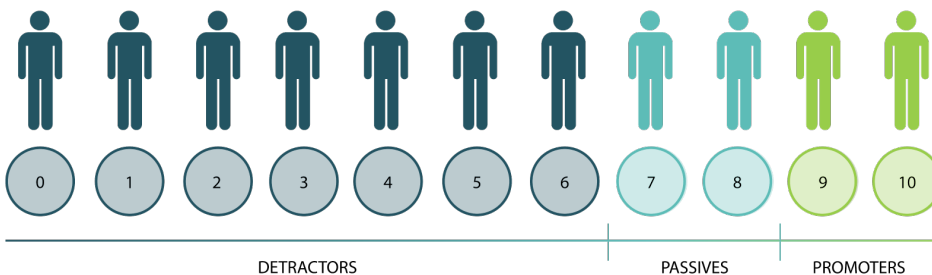
– Harley Manning, Forrester

INTRODUCTION

WHY READ THIS GUIDE BEFORE YOU BUY

When the boss said “Find me an NPS program!” - it fell on your desk. Right? Now you have to find and evaluate several different NPS vendors and tools, and you don't have much time.

There are some great Net Promoter Score programs out there. We know, we're one of them. But while they all offer, in one form or another, the ability to ask that all important question, “On a scale of 0 -10, how likely are you to recommend this product?” - that's where their similarities end.



Comparing several platforms will make you wish you had a spreadsheet just to be able to chart all of their different capabilities and services, not to mention prices (Spoiler Alert: We'll give you that spreadsheet below!). But even that won't help you answer the most important question: Is this the right NPS software for you?

If your business is high growth or enterprise level, you'd benefit from having more than an NPS tool. And, especially if you are B2B, SaaS, eCommerce, or digitally-driven, there are cutting-edge NPS innovations you'll very much want to look into.

This guide is designed to help you ask the right questions and compare the right things to be able to confidently choose the software that meets your needs now and can grow with you.

“Customers who had the best past experiences spend 140% more compared to those who had the poorest past experiences.”

— Peter Kriss,
Harvard Business Review

Let's start with you: What is your goal?

Finding not just a good NPS program, but the right one, really begins with you. What are you trying to accomplish? Net Promoter Score programs aren't the end goal, they're the means to an end.

Is your company working towards being more customer-centric?

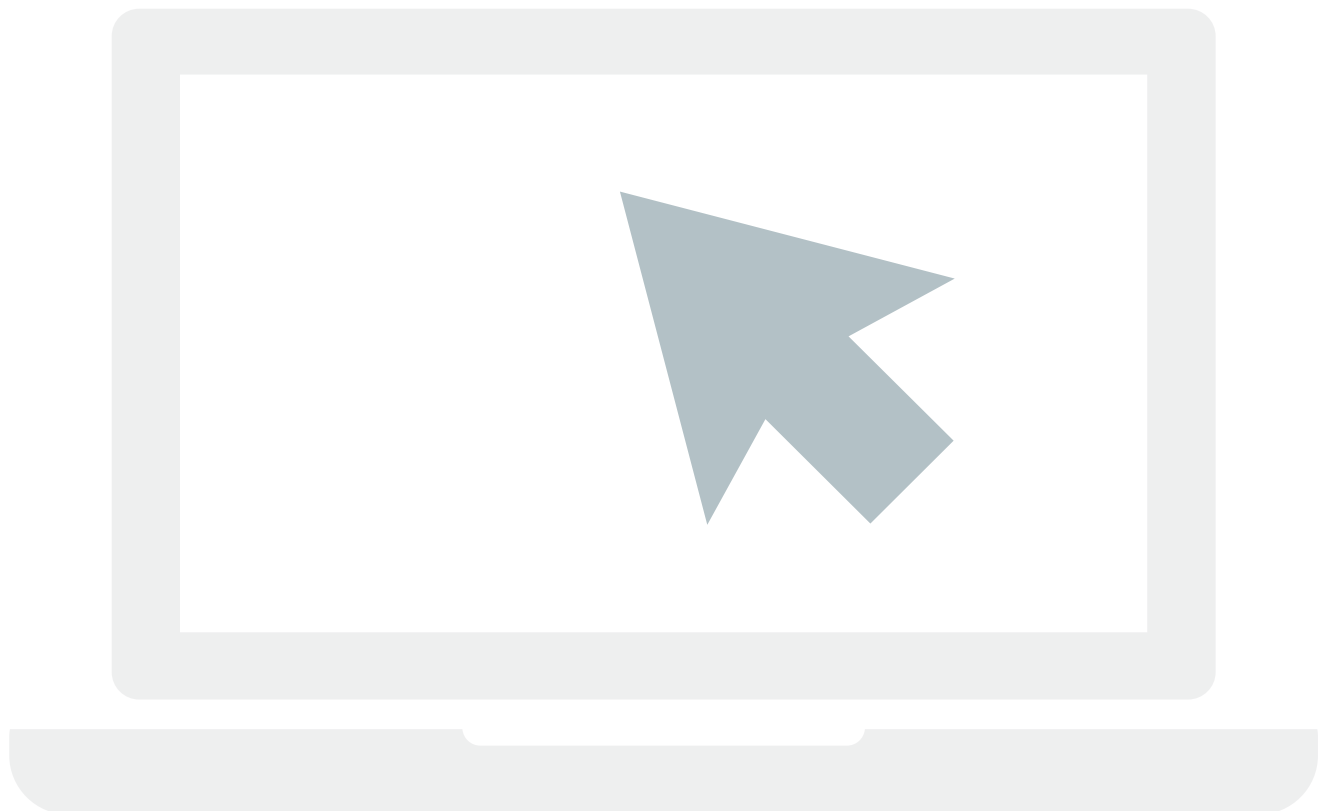
Are you trying to retain more customers?

Get more business?

Or, maybe this isn't your first rodeo - you've used an NPS platform before. Now you're looking for a improved version that's more customizable, features additional survey questions, offers a more modern approach (like in-app messaging), or is more aligned with your stage of growth.

Whatever your larger goal is, keep it at the front of your mind, because you're not just looking for NPS software. You're looking for the best way to help your company serve your customers.

Asking these questions will get you there.



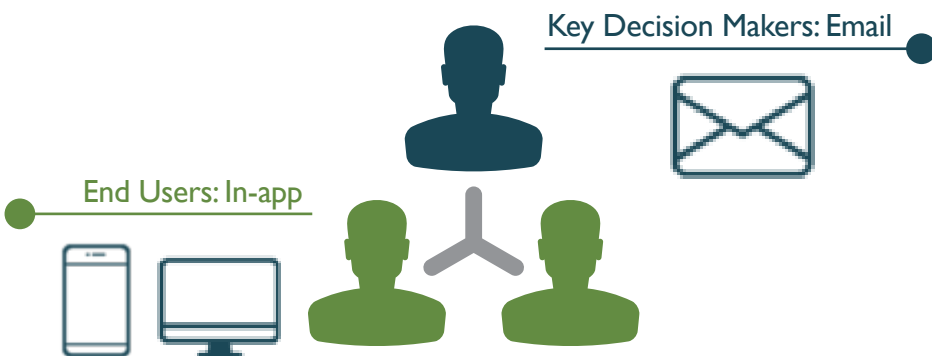
QUESTION 1

WHAT IS THE BEST WAY TO SURVEY YOUR CUSTOMERS?

In theory, you can communicate with your customers in any number of ways - on your website, inside your web or mobile app, through email, social, even via text.

Each segment of your customer base probably has a preferred method of communication. For some - like ecommerce customers -- it might be via email. And others will not respond to you at all unless they're in the midst of using your app.

In SaaS in particular, you should ask: Who are your stakeholders? Who are the decision-makers, and are they the ones using your product on a daily basis? Probably not. Those are often two separate groups. And that directs which channel of communication you'd use to send the NPS survey. If you want the buyer's feedback, and they aren't logging into your product every day, then an in-app survey wouldn't reach them. But if you want the opinions of people who are using your software, they might not respond to email, but would respond to an in-app survey.



When choosing an NPS survey program, it's important to take your customers' preferred channels of communication into account. After all, the survey doesn't work if people don't respond.

→ **MULTI-CHANNEL NPS IS HERE.**

Click here to learn more about how to choose the best feedback channels for your business.



QUESTION 2

WHICH CHANNEL DO YOU WANT TO START WITH?

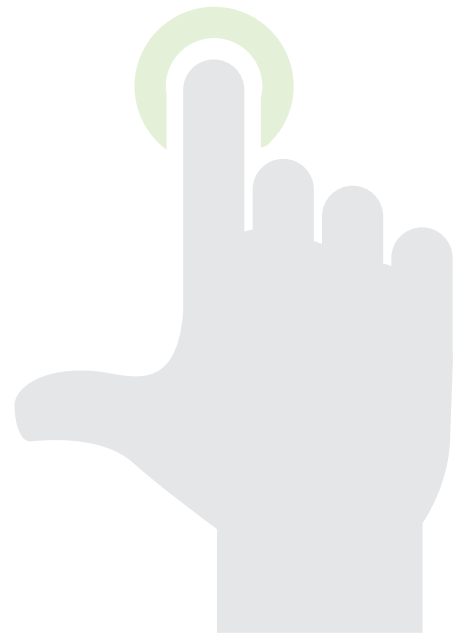


It's common for people to come to us asking about email NPS surveys - because they think email is the only option. Clearly, that isn't the case. If you've answered the first question, this is the follow-up one: Where would you like to start? Each channel has pros and cons.

EMAIL


Pros: Higher rates of qualitative feedback (customers who do take the time to answer a customer feedback survey via email are more likely to be invested in your brand and take the time to write more detailed comments).

Cons: Lower response rates (inboxes are already so crowded and emails can be easily deleted).



from: Clover
to: Jen Soriano
7/1/2018

Two questions about Clover

 **clover**

How likely are you to recommend Clover to another merchant?

0 1 2 3 4 5 6 7 8 9 10

Not at all likely Extremely likely

[Unsubscribe](#) powered by [wootric](#)

Email Survey

IN-APP (WEB OR MOBILE)

Pros: Higher response rates. In-app surveys can deliver contextual feedback (customers are in the process of using the product when they answer the survey). So you hear from more of your users.

Cons: Fewer in-app respondents will take the time to give qualitative feedback.

How likely are you to recommend Acme Analytics 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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Thank you! Care to tell us why?

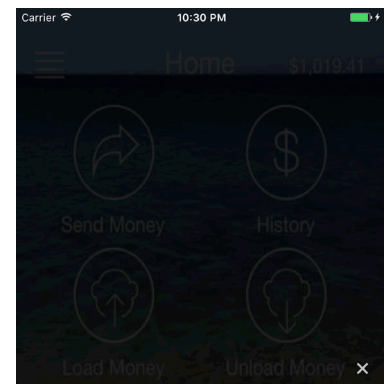
You guys are the best. Keep up the great work!

SEND

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

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In-app Web Survey



How likely are you to recommend SaaS.co to a friend or co-worker?

0 1 2 3 4 5 6 7 8 9 10

Not at all likely Extremely likely

SEND

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In-app Mobile Survey

SMS

Pros: More effective and immediate method for grabbing customer insights after transactions, deliveries and services.

Cons: Appropriate only if a customer is expecting to hear from you via text. Even if you have a customer's phone number, be cautious here. Also, SMS coverage can vary by region or country.

There's no shame in starting small - it's not easy to take on a huge customer feedback program if you're just starting out. Choose a channel, pick a customer base and start getting feedback. You'll eventually find that different customer segments or journey points benefit from different channels, and your NPS program will evolve accordingly.

Expect your Net Promoter Score program to mature over time and select a vendor able to support the increasing sophistication you'll likely need.

Facebook 9:17 PM 90%

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

Please reply with a score between 0 (Not at all likely) and 10 (Extremely likely)

9

Thank you! Care to tell us why?

> Delivery was right on schedule.

I Hi I'm

Q W E R T Y U I O P

A S D F G H J K L

↑ Z X C V B N M

123 space return

SMS Survey

QUESTION 3

WHEN WILL YOU SURVEY YOUR CUSTOMERS?

When it comes to deploying your NPS surveys, there are two primary approaches:

Relationship Monitoring

This approach sends NPS surveys at regular intervals overtime to assess your customer's overall loyalty to your brand -- rather than just their satisfaction with their last interaction. Here's a closer look at using NPS to monitor customer relationships.

Campaign-style: Email is traditionally used to send surveys to your customers en-masse on your timeline (often quarterly or annually). Annual surveys suffer from a few issues: They aren't very relevant to the customer; they don't give you timely feedback, and the sheer amount of data at one time can be overwhelming. That said, this method may be appropriate if you're committed to doing an annual brand or relationship survey (but if your focus is NPS, it's terribly old-school).

Drip/Cadence: This is the update to the classic relationship NPS approach and is used by many subscription-based products and services. The NPS survey rolls out to check their pulse every three to six months or so as part of an ongoing customer health program. Not every customer is surveyed at the same time so you get a constantly-updating score based on the overall satisfaction of your customers.

Checking in at Journey Points

In this case, often called "transactional NPS", surveys are sent after a customer has an interaction or completes a transaction with your company. This approach works well when you've mapped out your customer journey and can find logical points at which to check in with your customers via a survey.

NPS software platforms that can integrate with Mixpanel, Intercom, Salesforce, Zendesk and other systems of record work especially well for this type of timing.

Once you know the approach you need, dig in and see if vendors can deploy surveys the way you prefer. Each vendor has different capabilities. For example, if you are sending email surveys, do you want to do so from your own platform like Marketo or MailChimp? Or do you prefer to upload a list of customers and have the vendor's software send the surveys?



→ NOTE

Is NPS the right question to ask at journey points? In some contexts, a Customer Satisfaction (CSAT) or Customer Effort (CES) question is more relevant than Net Promoter Score. **Learn more.**

QUESTION 4

WHO ELSE SHOULD SEE YOUR NPS DATA?

Every department in your company can benefit from understanding your NPS score, and we encourage our clients to share their data as widely as possible. Departments like Customer Support, Marketing, Customer Success and Product Development can all benefit greatly from this data.

In addition, it is often helpful to be able to have multiple team members in your NPS platform, helping to close the loop with customers, dig into analytics and see reports.

Check to see how easy it is to give others in your company access to your NPS analytics platform. Are there different admin permission levels? Is there a limit to the number of people who are allowed access?

“For Net Promoter Score to drive customer-centricity, the CX champion must evangelize the program across the company, and that means making customer feedback data accessible. Software can support this if it is sophisticated enough to meet the needs of Product Development, Marketing and Success without requiring those teams to learn a complex new platform. Find a balance.”

– Jessica Pfeifer, Chief Customer Officer, Wootric

QUESTION 5

DOES THE SOFTWARE PLAY WELL WITH THE REST OF YOUR TECH STACK?

Moving the data to other systems using integrations

You should be able to take your data and view it through your preferred analytics platform, like Tableau or Looker, and share it through communication tools like Slack and Intercom, or via CRMs like Salesforce.

Triggering surveys based on events in other systems

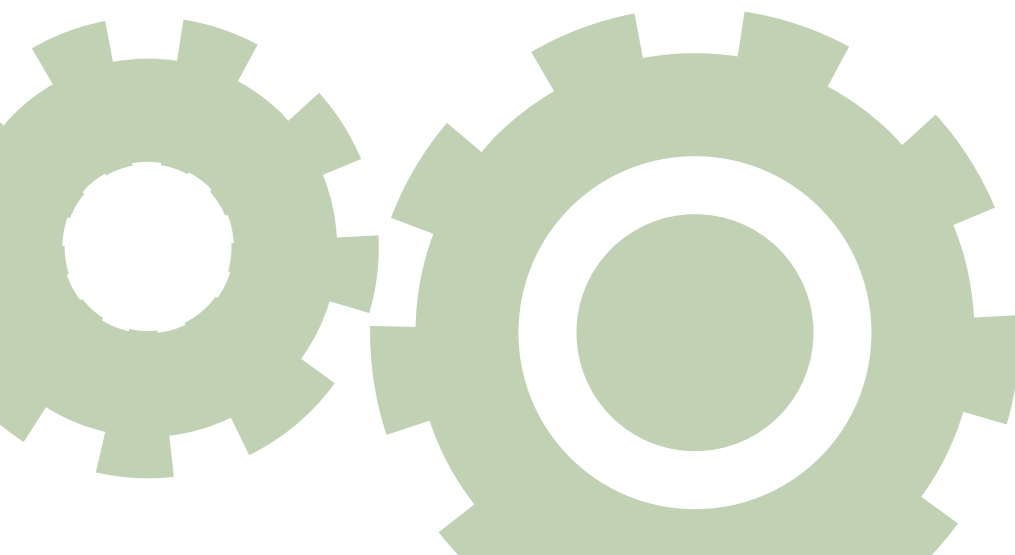
This is especially helpful if you are using surveys to monitor customer journey touchpoints.

Look for native integrations.

Whatever your tech stack is, you'll want to take note of NPS software vendors that offer native integrations to your systems of record. Native integrations remove technical and logistical hurdles to setup and ongoing maintenance of your program.

For example, Wootric offers a native two-way Salesforce.com integration. If a vendor isn't on the AppExchange, you may still be able to get data into Salesforce but it would require coding and technical support on your end.

When vetting an NPS program, you may want to ask: Do you have native integration with my systems of record? If not, what will be required, technically, to make it happen?



QUESTION 6

HOW MUCH EFFORT WILL IT TAKE TO SET UP?

Young startups can often set-up and GO, while larger organizations may require additional consultation. And that means software and services that offer customer support and success (at all levels) can give you a substantial leg up. Some NPS platforms, however, are purely self-service. Others, like us, go so far as to offer live support.

Ideally, the vendor will add value right from the start by listening to your goals and providing unbiased advice on how to best achieve them--not just deliver you a score. Customer Success can coach you on Voice of Customer best practices, including proven approaches to NPS implementation that align with your business model.

Does the NPS solution require training? Is it set-up-and-go? Will Customer Success be there to support you if you need it? All excellent questions to ask.

The self-serve style usually translates to limited customer support and robust FAQ content - and if you are a small business and that's all you need, then these programs can be good options. But if you are a larger company with more sophisticated needs, a Customer Success manager in your corner can make all the difference.

WOOTRIC OFFERS CUSTOMER SUCCESS

(one on one coaching via conference, chat, email)



QUESTION 7

WILL YOU NEED OTHER TYPES OF SURVEYS?

Net Promoter Score is a powerful question that cuts to the truth of customer loyalty like nothing else. Will they recommend you or won't they?

Over time, as you build out your Voice of the Customer program, you may find that additional CX metrics like CSAT (Customer Satisfaction) and CES (Customer Effort) can complement NPS and help you understand the customer journey in a more holistic way.

For example, with journey point triggers, you may want to consider if NPS is the right question to ask in all cases. You may want to ask customer satisfaction (CSAT) questions about a specific feature or customer effort questions (CES) around how much work is required to achieve a goal. Sometimes Customer Effort Score or CSAT questions are more relevant than NPS.

Here's what each question reveals:

Net Promoter Score

NPS asks "How likely are you to recommend this product/company to a friend or colleague?" The consummate loyalty question, this is a great survey to start with. It can help you identify customers who are likely to give negative reviews, customers who are at risk of leaving if their concerns aren't addressed quickly, and customers whose enthusiasm you can leverage to expand brand awareness reach more ideal customers.



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

powered by wootric

Customer Satisfaction Score

CSAT asks “How satisfied were you with the product/interaction?” and is useful for measuring satisfaction about specific features, products and experiences.

How satisfied are you with SaaSy.co?

Very unsatisfied 1 2 3 4 5 Very satisfied

powered by [wootric](#)

Customer Effort Score

CES gauges how much effort the customer put forth to complete a task or solve a problem. asks “How much effort did you have to put forth” to complete a task. Research by CEB, the creators of the Customer Effort Score, found that organizations “create loyal customers primarily by reducing customer effort - i.e. helping them achieve their goals quickly and easily.” SaaS companies often ask the CES questions at the end of onboarding or after a support interaction.

How easy was it for you to complete this task or action?

Very difficult 1 2 3 4 5 6 7 Very easy

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If these metrics are of interest, or are already being used by your company, you may want them on your radar as you evaluate NPS software vendors.



QUESTION 8

WILL YOU NEED TEXT AND SENTIMENT ANALYSIS?

Today's customers have little patience for lengthy surveys. Modern NPS surveys invite customers to explain their score in their own words. This yields rich qualitative feedback that can guide improvements to product and process. However, deriving insight from free text is a time-consuming challenge--and many companies don't bother! If you think you will be receiving more than a thousand comments each month, AI-driven analysis is something you should consider.

By surfacing themes and issues for you, text analytics software can reveal why your customers love you--or don't. This insight makes an NPS program actionable, whether you are prioritizing product improvements, getting a handle on operational issues or taking customer experience to the next level.

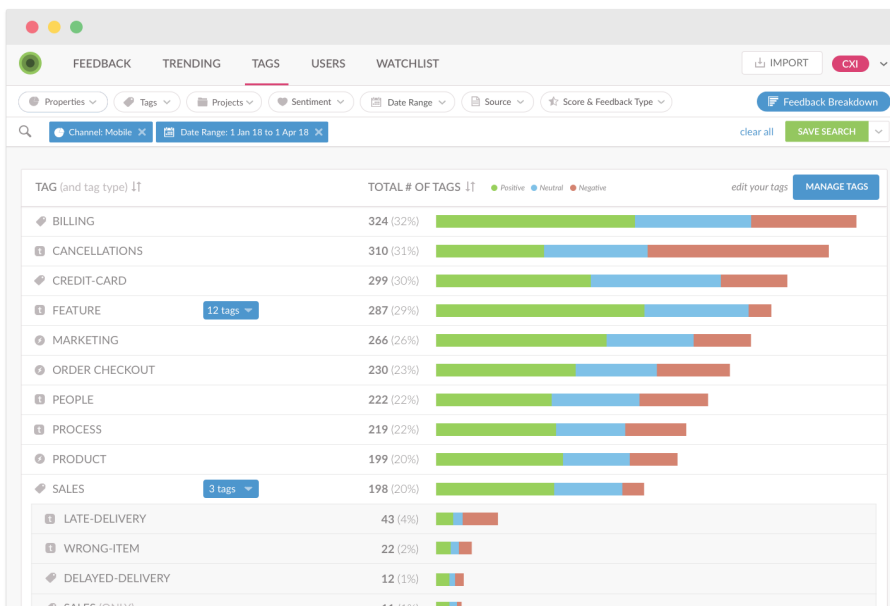
Machine learning can now quickly auto-tag and assign sentiment to each customer comment, but getting it right is tough. A good NPS software vendor will combine cutting-edge technology with a team that will work with you to ensure you get quality results out of the gate so that you can focus on taking action.

Questions to ask: Will I need to seek an additional vendor for text & sentiment analytics?

→ NOTE

Are text and sentiment analytics worth it?

Yes for some companies, no for others. **Learn** whether or not your NPS program needs it.



QUESTION 9

HOW INNOVATIVE IS THE SOFTWARE VENDOR?

CX management is changing all the time. Customer expectations change quickly and so does technology. If it feels like you are in Customer Experience arms race with your competition, you aren't alone. You need an innovative CX platform to ensure you keep up. Innovative doesn't have to mean expensive or complex. What it does have to mean is that the NPS software you choose has to be committed to defining the cutting edge of their field.

How can you tell?

Check to see if they are producing thought leading content on their blog and guest posts.

Look at their resources - blog, e-books, social media. Are these resources genuinely helpful, or just covers packed with fluff?

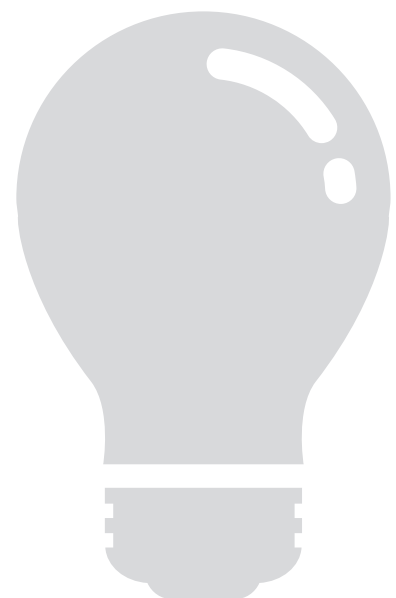
Are they talking about upcoming upgrades, improvements and expansions of their product?

More specifically, will experts be there to advise you as your Voice of Customer program matures, and will the software product be able to meet your changing needs? Innovation is paramount, especially when it comes to CX.

→ **THOUGHT LEADERSHIP & INNOVATION.**

What does this look like?

Check out an update from our product leaders **here**.



QUESTION 10

DOES THE VENDOR WORK WITH COMPANIES LIKE YOURS?

If the NPS vendor works with similar companies to yours, they probably understand your needs better than one that doesn't. They will be better able to help you get the information you need to improve your CX.

Look at their Customers page and review sites, like G2Crowd and AppExchange, to find out who they're working with. And during your product demo, don't hesitate to ask: "What customers do you work with that resemble me?"



DECISION TIME

You may want to start making your vendor evaluation list by first talking to friends and/or colleagues who have used NPS platforms before and have recommendations. Or read reviews and expert answers on G2Crowd and Quora, and factor in those opinions into which platforms you choose to investigate further.

Then, using the answers to the questions we've listed in this guide, develop a matrix spreadsheet. Here's a downloadable Excel template to get you started.

[CLICK HERE
for Vendor Evaluation Template](#)

Once you have the vital data in one place, request a product demo from two or three.

The demo can tell you a lot about a company. If companies have sales teams, it means they have unique features and approaches that may or may not be a fit. And, once you schedule a demo, notice which companies respond fastest - it's your first look into how customer-centric they really are and how they will treat you in the future.

Good luck!



ABOUT WOOTRIC

Wootric is a customer feedback management platform that enables businesses to measure and boost customer happiness.

Feedback Collection & Analysis

Wootric measures proven CX feedback metrics such as Net Promoter Score (NPS), Customer Satisfaction (CSAT) and Customer Effort Score (CES). We support in-app, mobile, email and SMS surveys, all of which offer open-ended responses.

Wootric CXInsight™

Consolidate all of your Voice of Customer feedback in our AI-powered platform and unlock insights from large quantities of qualitative data. Upload data from any source.

We share the latest news, innovations and thought leadership in the CX space on our [blog](#).



Learn more:

wootric.com | info@wootric.com