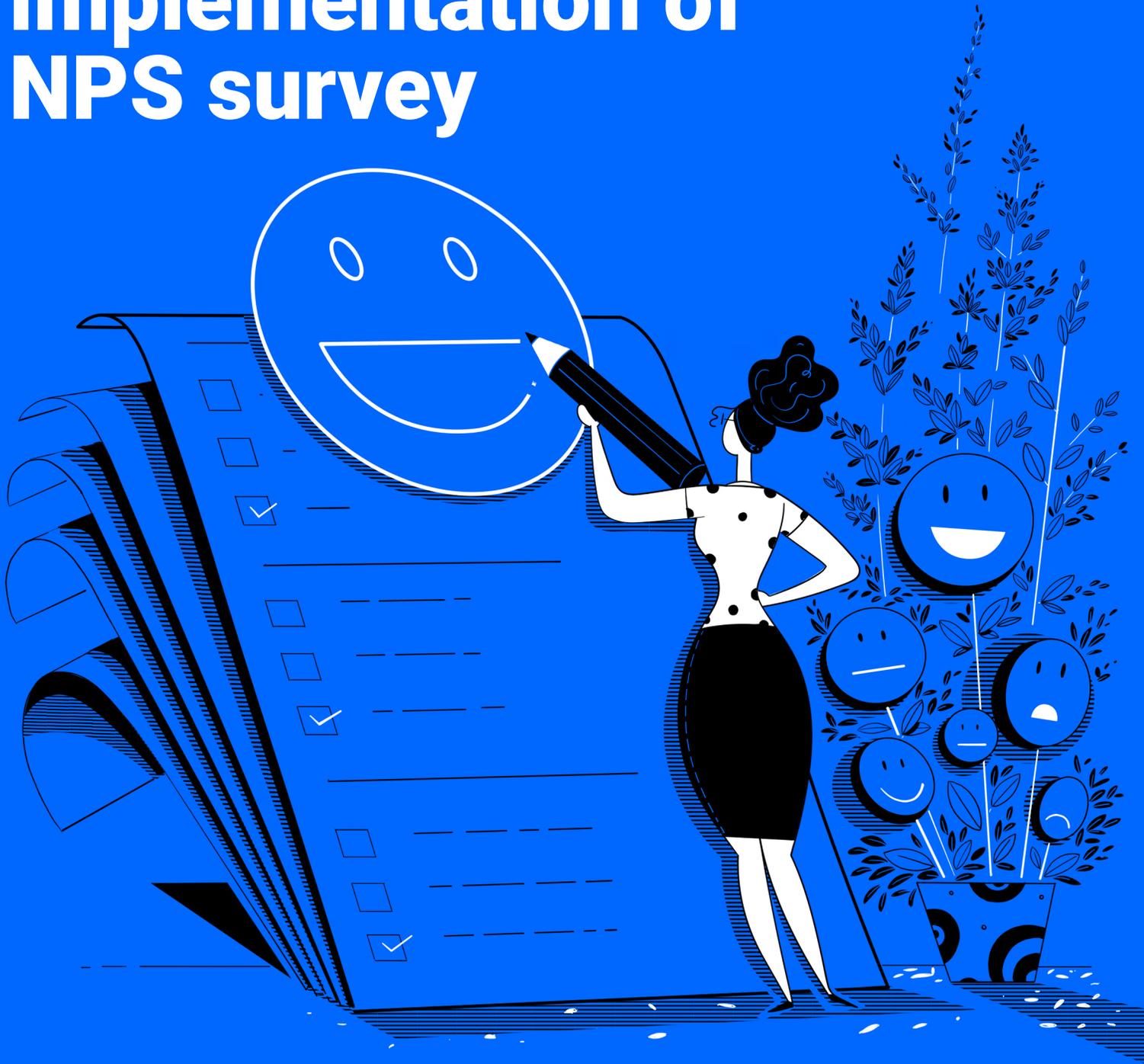


A Handbook

# FAQs on an actionable implementation of NPS survey



**ZOHO CRM**

— The world's favourite CRM —

## 01 **NPS: Understanding the basics**

- What is a Net Promoter Score survey?
- What do the ratings denote?
- How to calculate NPS?
- How to interpret NPS?
- Can the question be changed?
- What are the benefits?
- What are the cons?
- What are the different types of NPS surveys?
- What is a good NPS?
- What is a bad NPS?
- How can the score be improved?
- How is it different from other surveys?
- Is NPS the silver bullet for customer experience?
- Why there is skepticism about NPS surveys?
- What are the best books to read about NPS?

## 02 **Action Plan For NPS Survey**

- Who should be targeted?
- When is the right time?
- What is the NPS survey flow?
- What are the channels of NPS survey distribution?
- What other data can be collected?
- What should you do after collecting responses?

## 03 **Implementation using Zoho applications**

- What are the Zoho applications that can be used?
- How do you create the survey?
- Where can you see the responses?
- How do you push survey results to CRM?
- How do you push survey results to Desk?
- What are the different methods for analyzing your data?

## 04 **Best Practices**

- What are the do's and don'ts?
- What is the best method for distributing your survey?
- How can I increase the number of responses?
- Who should I follow up with?
- What is the best way to follow up?
- How to follow up with promoters?
- How to follow up with passives?
- How to follow up with detractors?
- How can I get assistance with implementing the survey?

# Table of contents



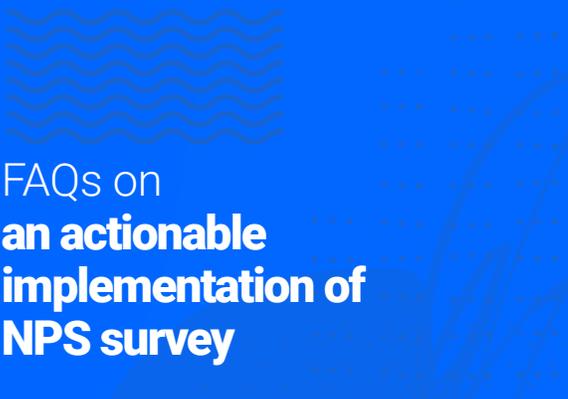


A Net promoter Score survey is a leading indicator for understanding where a brand stands when it comes to customer experience and customer loyalty. This guide will help give you a clear idea of what NPS is, how it is calculated, why is it needed, the pros and cons of using it and how can it be implemented.



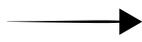
NPS was developed by **Fred Reichheld**, Bain & Company and Satmetrix, introduced by Reichheld and has been adopted by about two-thirds of Fortune 1000 companies.

(Note: Net Promoter Score, Net Promoter, and NPS are trademarks of NICE Systems, Inc., Bain and Company, Inc., and Fred Reichheld.)



FAQs on  
**an actionable  
implementation of  
NPS survey**

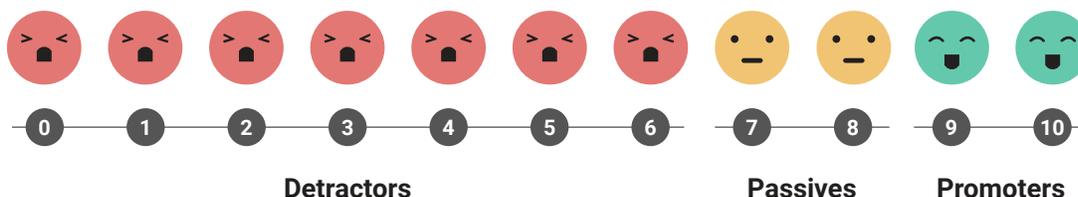
# NPS: Understanding the basics



## 1. What is a Net Promoter Score survey?

A Net Promoter Score (NPS) survey is a single question survey that is sent to customers to get a concise understanding of their loyalty to your brand or organization.

On a scale of 0 to 10, how likely are you to recommend our product to a friend or colleague?



## 2. What do the ratings denote?

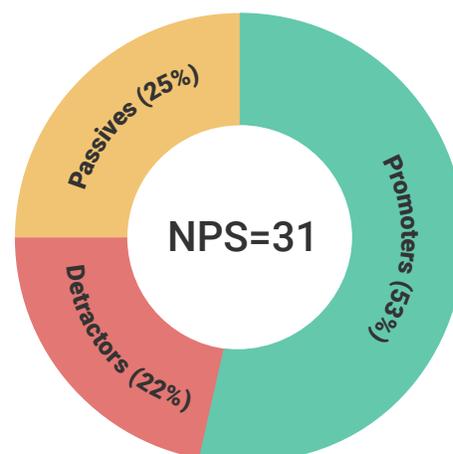
Based on the ratings, customers can be grouped into three categories:

Category	Rating	Satisfaction level	Behavior
 Promoters	9, 10	High	Value creating customers
 Passives	7, 8	Neutral	Likely to move to other category
 Detractors	0 - 6	Low	Likely to churn

## 3. How to calculate NPS?

Net Promoter Score is calculated by subtracting the percentage of participants who have given a score of 6 or below from the percentage of participants who have given a score of 9 or 10.

**Net Promoter Score = % of promoters - % of detractors**



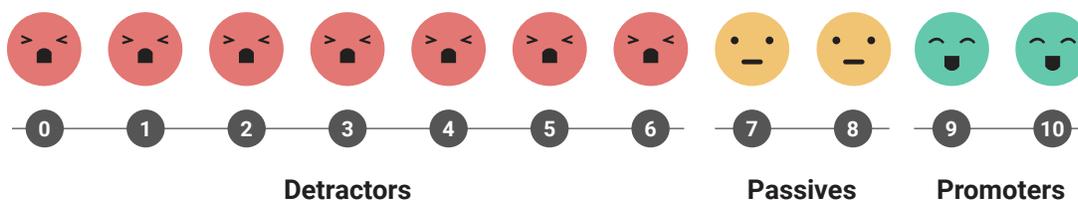
## 4. How to interpret NPS?

The score will be in the range of -100 to +100. If the score is negative, it is understood that the company has more detractors than promoters, and a positive score denotes the opposite.

## 5. Can the question be changed?

No, the NPS survey question is standard, and should not be changed. However, the specific product or brand name can be included in the question.

On a scale of 0 to 10, how likely are you to recommend our product to a friend or colleague?



## 6. What are the benefits?

There are several benefits that can be obtained using NPS.

- Predict business growth
- Lower the churn rate
- Identify loyal customers
- Uncover areas for improvement
- Increase customer lifetime value
- Find opportunity to upsell and cross-sell
- Benchmark against competitors

## 7. What are the cons?

As popular and useful NPS might be, it comes with a few challenges.

- Doesn't answer the question of "why"
- Doesn't differentiate detractors accurately
- Differs based on region and segment for the same product
- No proper follow-up
- Handled in silos

## 8. What are the different types of NPS surveys?

**Transactional survey:** Focuses on a customer's experience after a particular transaction.

**Relational survey:** Focuses on a customer's overall experience with the brand.

## 9. What is a 😊 good NPS?

Any score above 0 should be considered good, as the business has more promoters than detractors. Companies with scores above 30 are performing well, and above 70 refer to among the top rated companies, but again, it depends on the industry. A score close to 100 denotes that nearly all your customers would recommend your business, which is not easily achievable.

## 10. What is a 😞 bad NPS?

Any negative score denotes that the company has more detractors than promoters. However, here is where industry benchmarks need to be considered, as a negative score is hard to interpret without comparable scores.

## 11. How can the score be improved?

The score can be improved by taking steps to convert passives and detractors into promoters. The reasons for the dissatisfaction should be identified and rectified. Customers should be notified about this, and any subsequent change in rating should be considered.

## 12. How is it different from other surveys?

While most customer feedback surveys look into customer satisfaction, NPS pays attention to customer loyalty. NPS is used in two-thirds of the companies to compare, CSAT is used in less than a half and only 14% of companies measure CES. (source:[Lumao](#))

## 13. Is NPS the silver bullet for customer experience?

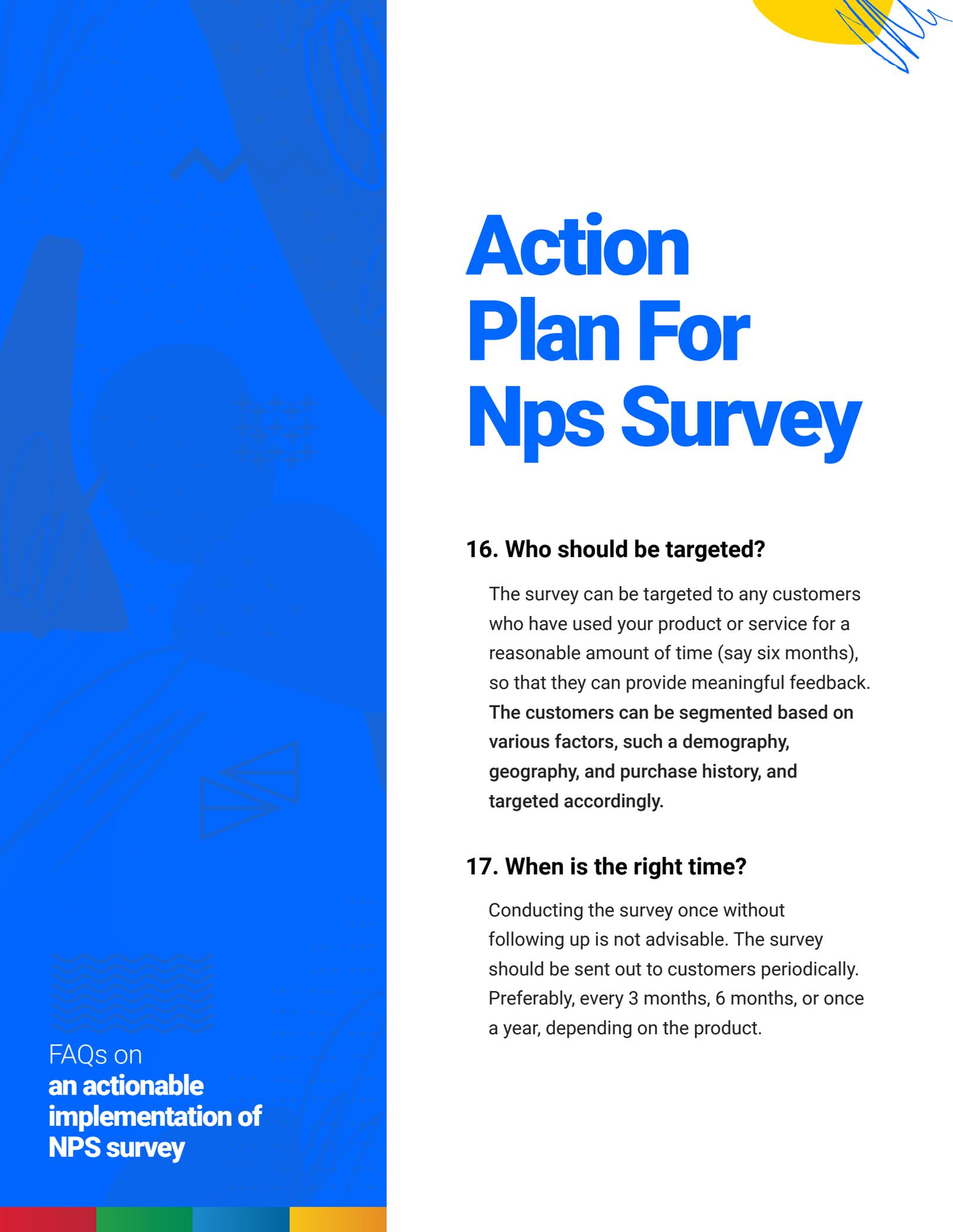
NPS survey is one of the techniques for gauging customer experience. It is just the beginning for understanding your customers and improving their experience.

## 14. Why there is skepticism about NPS surveys?

NPS survey was sold as a magical solution for customer experience management and many companies implemented NPS but failed to take actions based on the results. These companies only saw NPS as a vanity project and missed addressing the pain points of the customers or using the results to fuel their marketing and retention decisions. Thus NPS became just a number to them leading to skepticism.

## 15. What are the best books to read about NPS?

- The Ultimate Question 2.0: How Net Promoter Companies Thrive in a Customer-Driven World by Fred Reichheld and Rob Markey.
- Answering the Ultimate Question: How Net Promoter Can Transform Your Business by Laura L. Brooks PhD and Richard Owen



# Action Plan For Nps Survey

## 16. Who should be targeted?

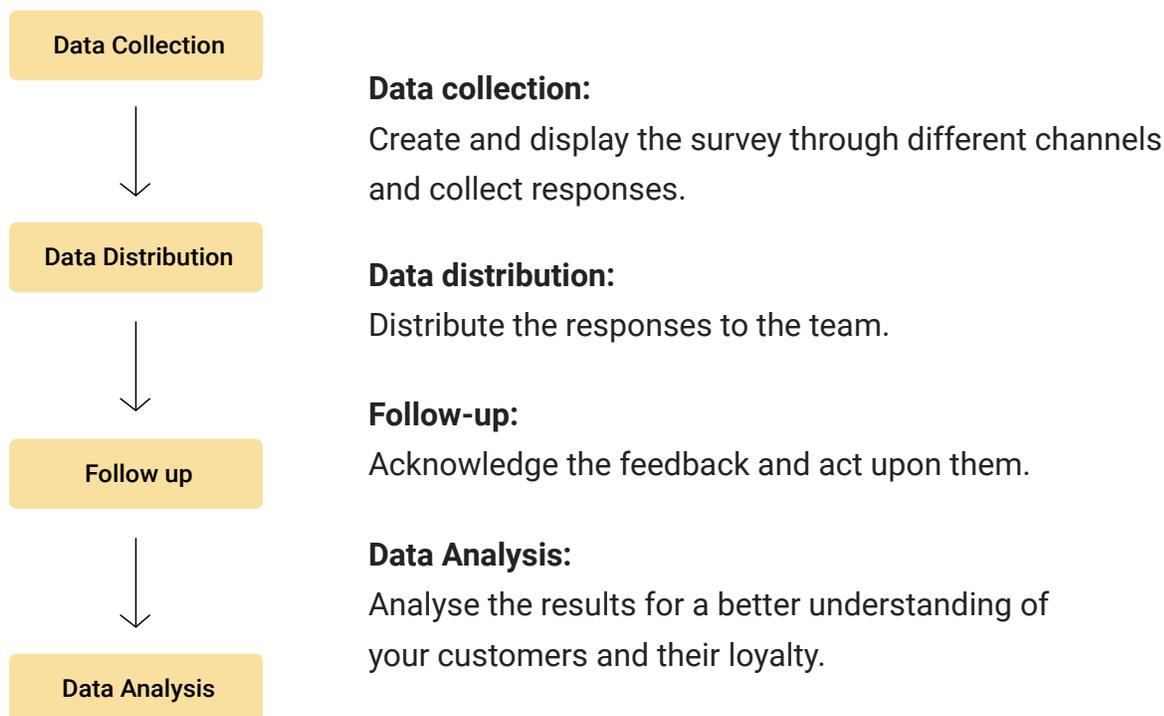
The survey can be targeted to any customers who have used your product or service for a reasonable amount of time (say six months), so that they can provide meaningful feedback. The customers can be segmented based on various factors, such a demography, geography, and purchase history, and targeted accordingly.

## 17. When is the right time?

Conducting the survey once without following up is not advisable. The survey should be sent out to customers periodically. Preferably, every 3 months, 6 months, or once a year, depending on the product.

FAQs on  
**an actionable  
implementation of  
NPS survey**

## 18. What is the NPS survey flow?



## 19. What are the channels of NPS survey distribution?

**Web pages (Logout):** Redirect customers to a survey landing page upon logging out from your product (it will be a lot more easier if you are SaaS company).

**Email:** Add the survey as hyperlinked text or CTA button, or embedded in emails sent to customers.

**Inside product:** Display the survey as a banner inside your product for real-time feedback.

**SMS:** NPS surveys can be sent via text messages and can be personalized and customized and sent to a targeted list of valued customers.

**Digital boards:** The survey can be displayed using digital boards in public places like airports, theaters and shopping malls.

## 20. What other data can be collected?

- A follow-up question can be used based on the rating, where customers can describe their experience or the reason for the score.
- Contact information
- Consent for followup (GDPR compliance)

## 21. What should you do after collecting responses?

Once responses are collected, there are two important activities to perform.

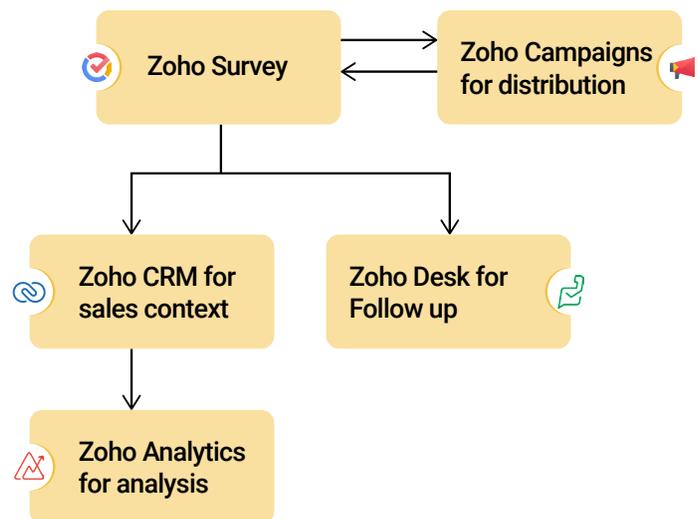
**Follow up:** The customers have taken the time to give their input. Now it's your turn.

Follow up with every customer based on their ratings.

**Analyze:** NPS score may vary across segments, categorize and segment your data, and create reports for analysis.

# Implementation using Zoho applications

## 22. What are the Zoho applications that can be used?



**Zoho Survey:** To create and launch the survey

**Zoho Campaigns:** For email campaigns

**Zoho CRM:** To combine with sales information

**Zoho Desk:** To follow up with customers

**Zoho Analytics:** For reports and dashboards

FAQs on  
**an actionable  
implementation of  
NPS survey**

## 23. How do you create the survey?

Zoho survey provides a built-in NPS survey rating scale that can be used along with follow up questions. Upon receiving responses, users are categorized and the scores are calculated automatically.

## 24. Where can you see the responses?

The responses can be obtained from Survey and they can then be pushed to CRM and Helpdesk, as they will give better sales context and help in the follow-up process.

## 25. How do you push survey results to CRM?

Pushing the survey results to CRM will give better sales context to the responses. This can be achieved by using the Survey-CRM Integration.

- Integrate Survey with CRM
- Choose which CRM module to push the records to
- Choose whether to add a new record for each response or update existing records
- Associate the survey questions to the appropriate CRM fields

This will push the survey records inside CRM as and when they are submitted. Check out our resources for [more details](#) on the integration and automation of field updates.

## 26. How do you push survey results to Desk?

Set up triggers to send emails as and when survey responses are submitted and these emails can be raised as tickets in desk.

- Add an email trigger in Zoho Survey.
- Add the survey responses as merge fields or as a pdf document to the email.
- Capture these emails in Zoho Desk as tickets.

[More details](#) on how to generate tickets in Zoho Desk for emails triggered from Zoho Surveys.

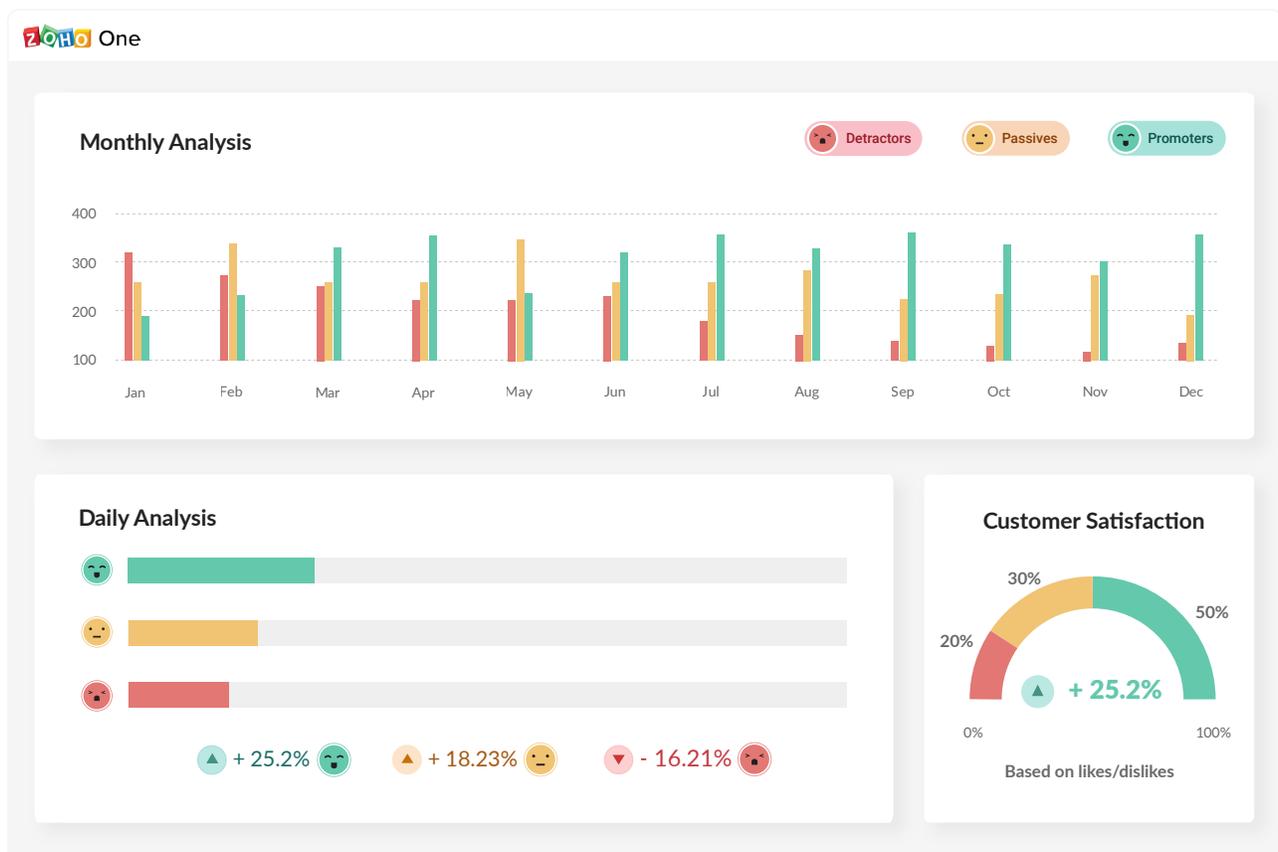
## 27. What are the different methods for analyzing your data?

You can perform a segment analysis for a better understanding of the relationship between your customer's profiles and their ratings. Customers should be divided into clusters based on relevant factors, and the ratings given by each cluster should then be analyzed.

A few reports that can be helpful are:

- Score vs Region
- Score vs Age of Customer
- Score vs Edition
- Score vs User type
- Score vs Industry type
- Score vs Org size
- Type of issue faced vs Edition
- Type of issue faced vs User type
- Type of issue faced vs Industry
- Score vs Country
- Type of issue faced vs Country

Zoho Analytics helps in generating reports and building dashboards with the survey results.



# Best Practices

## 28. What are the do's and don'ts?

### Do's

- Measure NPS continuously.
- Act based on customer feedback.
- Follow up with respondents.
- Ensure GDPR compliance.
- Share feedback with the rest of the organization.

### Don'ts

- Treat all customers the same way.
- Use the survey just for social status.
- Handle the survey and follow-ups in silos.
- Take too long to analyze the results.

FAQs on  
**an actionable  
implementation of  
NPS survey**

## 29. What is the best method for distributing your survey?

Having the survey displayed inside your product (if possible) is preferred for SaaS products, as it lets users share their feedback while using the product. This channel provides quick access, and fast, guaranteed responses. Whereas, in general, surveys sent through text messages have a better open rate and response rate.

## 30. How can I increase the number of responses?

- Personalize the emails/web pages
- Make it convenient for users to participate
- Choose the right time to survey your customers
- Choose channels to reach out at your customers' convenience
- Do not over-survey your customers
- Respect your customers' privacy

## 31. Who should I follow up with?

It is good to follow up every customer who has given feedback. However, as detractors are likely to spread negative feedback, immediate attention is required for this particular group.

## 32. What is the best way to follow up?

Following up within 24 hours of receiving responses helps. Make sure that you read the customers' feedback comments, if any, and follow up based on their response category.

## 33. How to follow up with promoters?

Promoters can be contacted to collect more details about their experience in the form of testimonials, customer stories, or case studies. They can be directed to review sites to share their views. You can also try converting these loyal customers into advocates for your brand.

## 34. How to follow up with passives?

The passives are customers who are neutral right now, and could turn into detractors or promoters at any moment. It is better to reach out to these customers, provide any required assistance, and make sure you convert them as promoters.

### **35. How to follow up with detractors?**

Detractors are customers who are highly dissatisfied and are likely to churn. Follow up with these customers as soon as possible, discover any issues they're facing, resolve them, and improve their experience with your brand.

### **36. How can I get assistance with implementing the survey?**

You can get in touch with [@zohocrm](#) or [@paintpointpitch](#), and we will be happy to assist you in the process of implementing your survey and obtaining the benefits.

## Contact Us

### USA

- **California**

Zoho Corporation  
4141 Hacienda Drive, Pleasanton,  
California 94588, USA  
Phone : +1 877 834 4428 | +1 615 671 9025

- **Austin**

Zoho Corporation  
3910 S, IH 35, Suite 100, Austin,  
Texas 78704, USA

### INDIA

- **Chennai**

Zoho Corporation Pvt. Ltd.,  
Estancia IT Park, Plot No. 140 & 151, GST Road,  
Vallancherry Village, Chengalpattu Taluk,  
Kanchipuram Distric 603 202, INDIA  
Phone : +91 (44) 71817070 | +91 (44) 71817000  
+91 (44) 67447000

- **Tenkasi**

Zoho Corporation Pvt. Ltd.,  
Silaraipuravu Village, Mathalamparai,  
Tenkasi, Tirunelveli District 627 814, INDIA

## Zoho CRM Resources

[www.zoho.com/crm/resources](http://www.zoho.com/crm/resources)



[www.zoho.com/crm](http://www.zoho.com/crm)