

Best Practice: NPS Survey Integrated with Account Planning



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Beyond Philosophy Services:

Beyond Philosophy is recognized as the worlds thought leaders in Customer Experience. We have written three international bestselling books on the subject. Formed in 2002, Beyond Philosophy works internationally with organizations such as IBM, FedEx and American Express to name a few, from our offices are in London, England and Atlanta, Georgia, USA.

We help improve our clients Customer Experience by harnessing our knowledge and experience of practical implementation around the globe. We have proven expertise in de-risking implementations, increase speed of project delivery and saving costs through our engagements. Our tools and techniques are renowned for their practical application and have been tried and tested in many sectors.

Our services are:

Strategic Guidance – We work with all levels of management in an organization and guide them on the decisions that need to be taken to improve their Customer Experience. We start by asking three key strategic questions:

-  What is the Customer Experience you are trying to deliver?
-  What emotions are you trying to evoke?
-  Is your Customer Experience deliberate?

Our consultants work with the organizations to answer these key questions and put in place actions that will improve the organizations revenues, retain customers and save costs.

Training – We have well developed training programs for organizations from senior leadership to front line people. We also have developed specific training for Customer Experience professionals, whom we train and certify on our tools and techniques. We believe in “experiential” training, getting the delegate to feel what their Customer Experience is really like. We use real-life case studies to demonstrate our key points.

Market Insight and research – We specialize in conducting Customer insight on the subconscious and emotional aspects of the Customer Experience. We have developed models, with London Business School, that can predict revenue benefit an organization can enjoy through improving their experience. We put in place measurement tools that can measure the total Customer Experience.

Conference speaking – We have a team of people who deliver high quality conference speeches around the globe on how to improve your Customer Experience.



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Common Issues with NPS Survey and Account Planning:

- ▶ Account Planning and the NPS Survey are conducted completely separately and viewed as disconnected processes.
- ▶ The customer is **NOT** at the center of either NPS Survey design nor account planning.
- ▶ Rush to send out survey without thought to long-range business plan.
- ▶ Not involving the Sales/Account Managers in the survey process, intent, and implementation.
- ▶ Asking the wrong questions in the NPS survey.
- ▶ Asking the wrong customers to participate in the survey.
- ▶ Lack of or low participation by customers.
- ▶ No perceived value from the NPS survey to customers or organizations.
- ▶ Sales/Account Management not in place or structure not well aligned.
- ▶ NPS survey and business outcomes not aligned or well understood.
- ▶ Lack of incentives and rewards aligned with NPS survey and account planning.
- ▶ Inability to discern what data to concentrate on, what data means and how to utilize it.
- ▶ Lack of clarity on NPS survey and other methods of customer data collection (i.e., CEO dashboard, balance scorecard, specific product or service related surveys).
- ▶ Lack of well-defined protection of customers (i.e., reducing the # of times they are surveyed in a year).
- ▶ Discomfort or lack of knowledge of how to:
 - enlist the right customers and encourage participation
 - interpret collected data
 - discern key themes, issues, and opportunities
 - develop an effective action plan
 - communicate the results and action plan back to the customer (and to management)
 - leverage Promoters, shift and/or neutralize Passives and Detractors
 - leverage/align NPS results with account planning.
- ▶ Drive business outcomes with the collected and analyzed data.
- ▶ Align and leverage results and action plans from the NPS survey to organizations and customers.
- ▶ Leverage the NPS survey to build/extend (profitability of) customer relationships and improve the customer experience.
- ▶ Conflicting priorities.
- ▶ Lack of clear ownership, accountability, and empowerment.

The next page provides an approach and outline for proactively building a solid foundation for surveying and account planning.



Building a Solid NPS Survey and Account Planning Foundation

Goal:

Build customer experience metrics discipline into customer-led account planning. Individualized coaching to Sales/Account Managers to enable all accounts to complete the NPS survey; and successfully communicate results and action plan to customer, and integrate into account planning.

Approach & Deliverables:

- 📌 **Conduct needs analysis** via interviews with key program stakeholders to best determine approach, deliverables, and recommendations for program.
- 📌 **Review and recommend changes to the NPS survey** which are appropriate to accounts and better capturing key elements of the customer experience.
- 📌 **Develop a sampling strategy to improve participant levels:** an optimized and bias-free sampling strategy for the accounts to ensure actionable data and account planning. Coaching account managers on how to get higher % (and appropriate level) of participants. Individual calls with managers to discuss their unique account needs.
- 📌 **Review current sales/account planning structure:** roles and responsibilities, and provide recommendations. Review current plans for account planning materials, timelines, organizational alignment, and create touch-point document between NPS Survey and account planning processes, and possibly sales training, as needed. Provide seamlessness between programs and organizations. In addition, review and advise on empowerment, accountability, and incentive models.
- 📌 **Develop interpretive advisories of NPS survey data to use for account planning:** create a customer scorecard for account managers and their management to use as a “guide-post” for the customer relationship and experience. Determine the key charts to include in reports. Provide interpretive reports/guides based on data collected to make it easy for account managers to discern data, draw conclusions, determine actions, and report to customer.
- 📌 **Coach interpretation of data and developing action plans:** individualized workshops to guide account managers in data analysis and action planning.
- 📌 **Create a customer-viewable report template** the account manager can use to present the survey results and actions back to the customer. Provide coaching on customer presentation, as needed.
- 📌 **Create a customer dialog (quarterly business review) structure and content** the account manager can use to prepare and conduct a formal customer dialog on the customer experience and relationship.



About the Author

Sue Morgan is an associate with Beyond Philosophy, a consultancy, training and Customer research organization. They are recognized as thought leaders in the Customer Experience and are located in London, England and Atlanta, Georgia USA. Sue has a background of working with top tier companies on maximizing the profitability of the customer relationship. For further information on the Customer Experience, and to read Colin Shaw's blog and videos, please visit Beyond Philosophy at www.beyondphilosophy.com