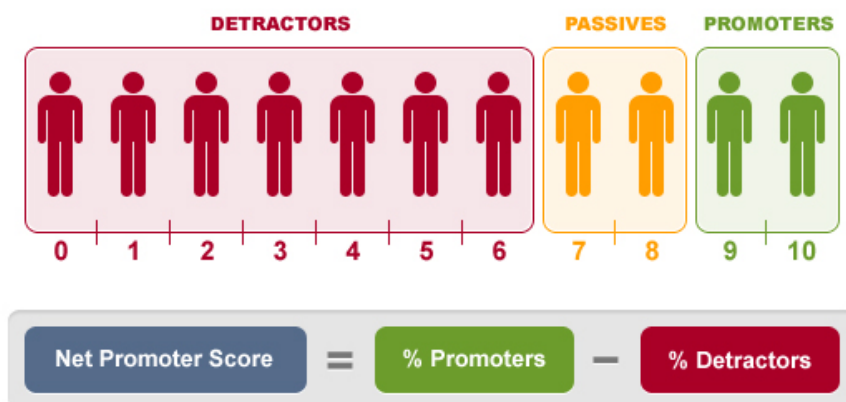


Use Case: How to create an NPS® survey with Clicktools

One of the many use cases for Clicktools is to create a customer satisfaction survey using The Net Promoter Score or NPS®. If you're not familiar with this methodology, it's a system based on the theory that your company's customers can be divided into three categories: Promoters, Passives, and Detractors.

NPS relies on one simple question: "How likely is it that you would recommend [company] to a friend or colleague?" Customers respond on a 0-to-10 point scale and are categorized as follows:

- **Promoters** (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- **Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- **Detractors** (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.



To calculate your company's NPS, take the percentage of customers who are Promoters and subtract the percentage who are Detractors. This gives you a consistent measure of your performance through your customers' eyes. Keep in mind that this calculation can be applied to a product line or even at an account level.

Good news: NPS is a simple survey to create in Clicktools!

Here's how. Let's create a short survey to know what account or contact took the NPS survey, the NPS question, and a follow-up question(s) based on their response. This will provide the best insight into your customer's view of your product or service.

Using hidden questions, you can relate the NPS survey to accounts, contacts, or even product lines. You can annotate several of these criteria on a single NPS survey to allow for granular reporting.

1. Account ID (hidden). Pre-populated from Salesforce using '&q1={!Account.Id}'

2. Contact ID (hidden). Pre-populated from Salesforce using '&q2={!Contact.Id}'

Setup a simple 0 to 10 radio questions with 10 being Excellent and 0 being our Poor selection.

How likely are you to recommend us to a friend or colleague? 0 1 2 3 4 5 6 7 8 9 10

Take advantage of Clicktools' conditional capability to ask follow-up questions of Promoters, Passives, and Detractors. We'll use separate text questions for each response. This way, the text is tailored to each possible selection, providing some personalization of responses.

I am sorry you are unlikely to recommend us. How can we improve our service to a level where you would be more likely to recommend us?	Thank you for your score. How could we improve our service so that you would be more likely to recommend us in the future?	Thank you for your high score. What do we need to do to maintain our level of service and receive recommendations from you?
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Once the NPS survey is created, you can create an email template to send it from CRM or via Clicktools Report Deployment. You may want to place an image in the email template that corresponds with the NPS question. This way, the actual survey will open with their answer pre-populated. All the recipient has to do is provide some text and submit their response.



Mapping this information to your CRM is quite easy as well. Simply map this information to an account or custom object in your CRM. Have a formula field make your calculations for you, so you can quickly and easily determine the satisfaction score.

NPS Name	Product X
Account	<u>Immolation</u>
NPS Score	89

More Info & Learning

For further guidance, you'll find this survey in the example library within the Clicktools application. Look for "Customer Advocacy (Promoter) Survey." Or, see details on how to create, deploy, map, and set up a report for deployment in [Clicktools Help](#). Select "Building a NPS and CSAT Survey" from the Getting Started Guides. Good luck with your NPS initiative!