



# Taking Action with Net Promoter Score (NPS) in Salesforce

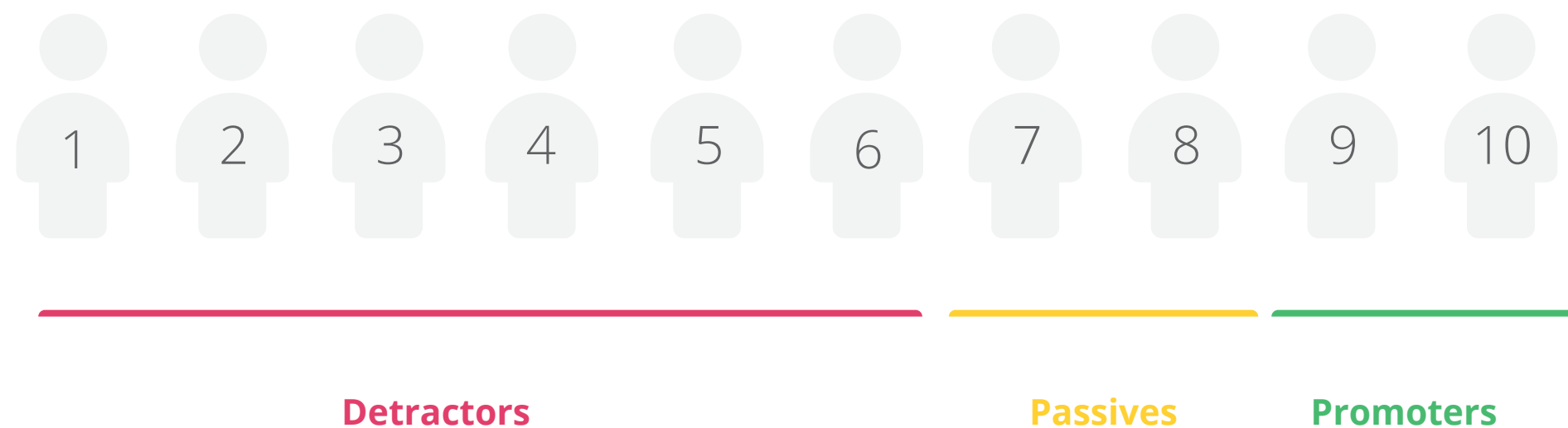
**The Net Promoter Score (NPS)** survey uses one simple question to quantify customer health: **“How likely are you to recommend our brand?”** When you integrate NPS with Salesforce, you can measure customer loyalty at each stage of the customer journey.





## What Is Net Promoter Score?

Net Promoter Score (NPS) is a valuable customer experience metric that uses one question to quantify customer sentiment: *How likely are you to recommend us to a friend or colleague?* Customers answer between 0 (not at all likely) and 10 (extremely likely), and their responses place them in one of three categories: **Detractors (0-6)**, **Promoters (9-10)**, or **Passives (7-8)**.





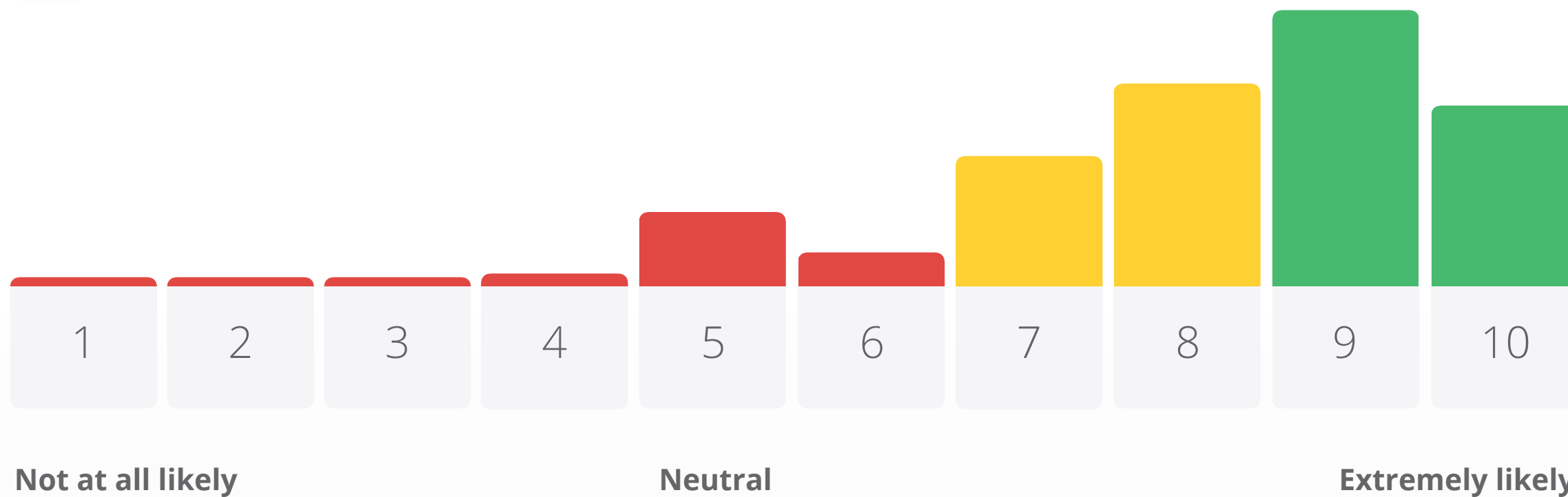
**These designations help companies identify at-risk customers** in danger of churning and happy customers who could serve as brand advocates. At a larger scale, organizations can also use their overall Net Promoter Score as a benchmark for success. The score is calculated by subtracting the percentage of detractors from the percentage of promoters, so the final value can range anywhere from -100 to 100.



55% Promoters



5% Detractors





## Why Measure Net Promoter Score?

Organizations like Zappos and Amazon have long focused on customer experience, and their success supports that philosophy—as does research. The Temkin Group found<sup>1</sup> that companies leading their industries in customer experience have all-around better customers, **who are more likely to buy again, more likely to refer others, and more reluctant to switch brands**. Basically, they're the customers every company wants. But how do you actually deliver the kind of experience that drives customer loyalty?



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<sup>1</sup> Temkin Group Report 2017



But these days, building brand advocacy is a bit more complicated than handing out discount cards. Brand perception is powerful in the age of the “connected customer,” when anyone can damage a company’s credibility with a bad online review or a casual comment. People trust others’ opinions too. In fact, 83% of consumers trust recommendations from people they know, and 63% of consumers trust online reviews. Companies should take full advantage of referral opportunities—and the NPS survey is the simplest way to uncover them.

When you measure Net Promoter Score at key stages of the buyer journey—like before an account renewal or after a purchase—the results begin to tell a story. For example, comparing overall Net Promoter Score right after a purchase vs. six months after might reveal that customer sentiment declines over time. With time-stamped insights like these, it’s easier to identify which areas of business and which types of customers need the most attention.

45%

of consumers share bad customer service experiences via social media



83%

of consumers trust recommendations from people they know



63%

of consumers trust online reviews





## PRO TIP

Include a free-form follow-up question asking respondents

***why they chose the score they gave.***

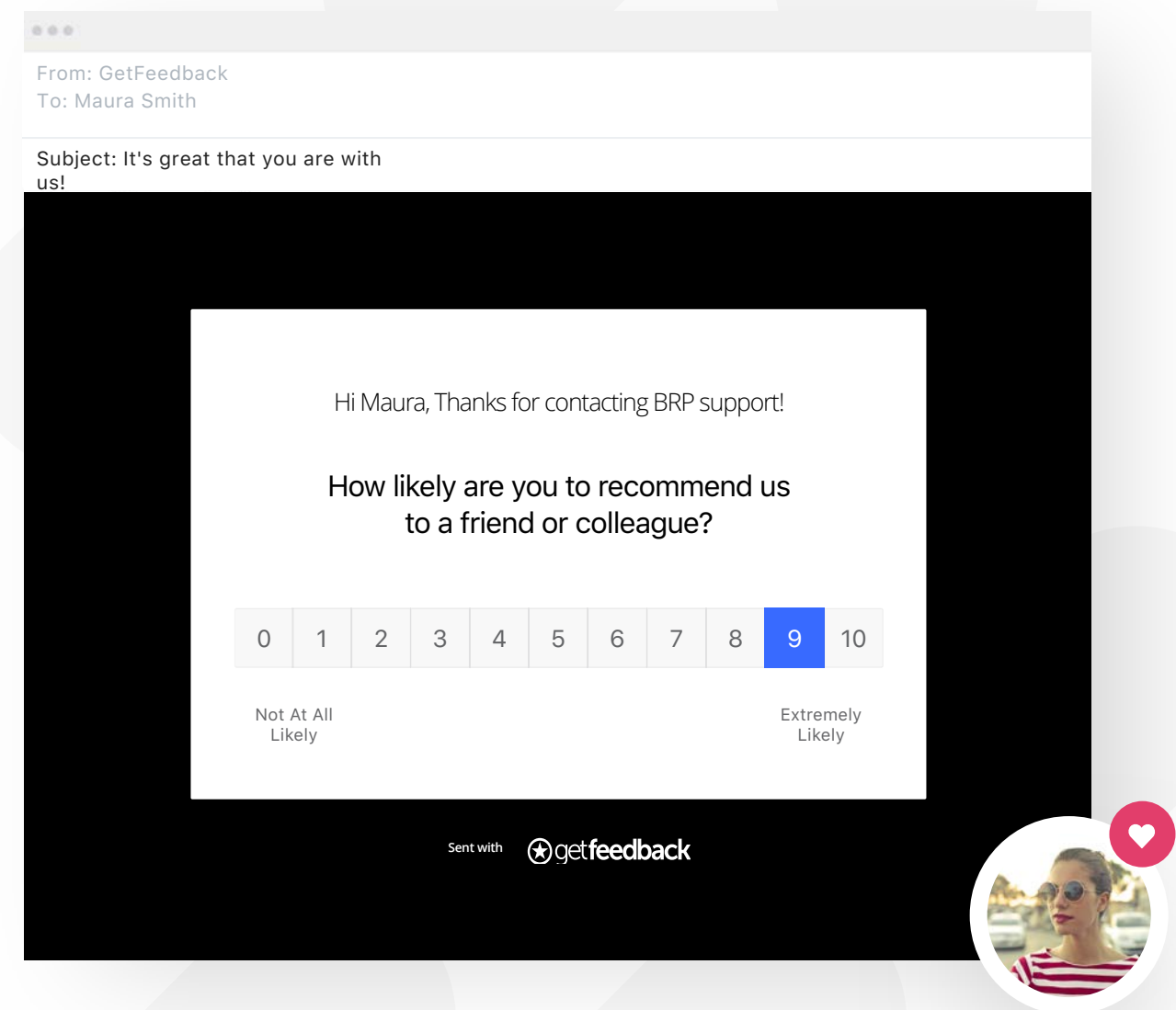
You can even use survey logic to customize  
the question based on the score.



## Measuring NPS with Salesforce

Unlike transactional **customer satisfaction (CSAT) surveys**, which measure specific customer interactions, the NPS survey takes the entire customer relationship into account. Instead of asking how one experience went, the NPS survey asks people to self-report their loyalty based on the overall experience they've had with a company. Because the NPS survey is more comprehensive, **it's especially important to avoid over-surveying customers.**

Most companies send the NPS survey to customers when they reach key milestones, or they distribute the survey to small batches of customers at a time. In both cases, **you have to segment your survey respondents in some way.** Since many companies store their customer data in Salesforce, integrating Net Promoter Score with Salesforce can simplify the entire surveying process, from distribution to analysis.

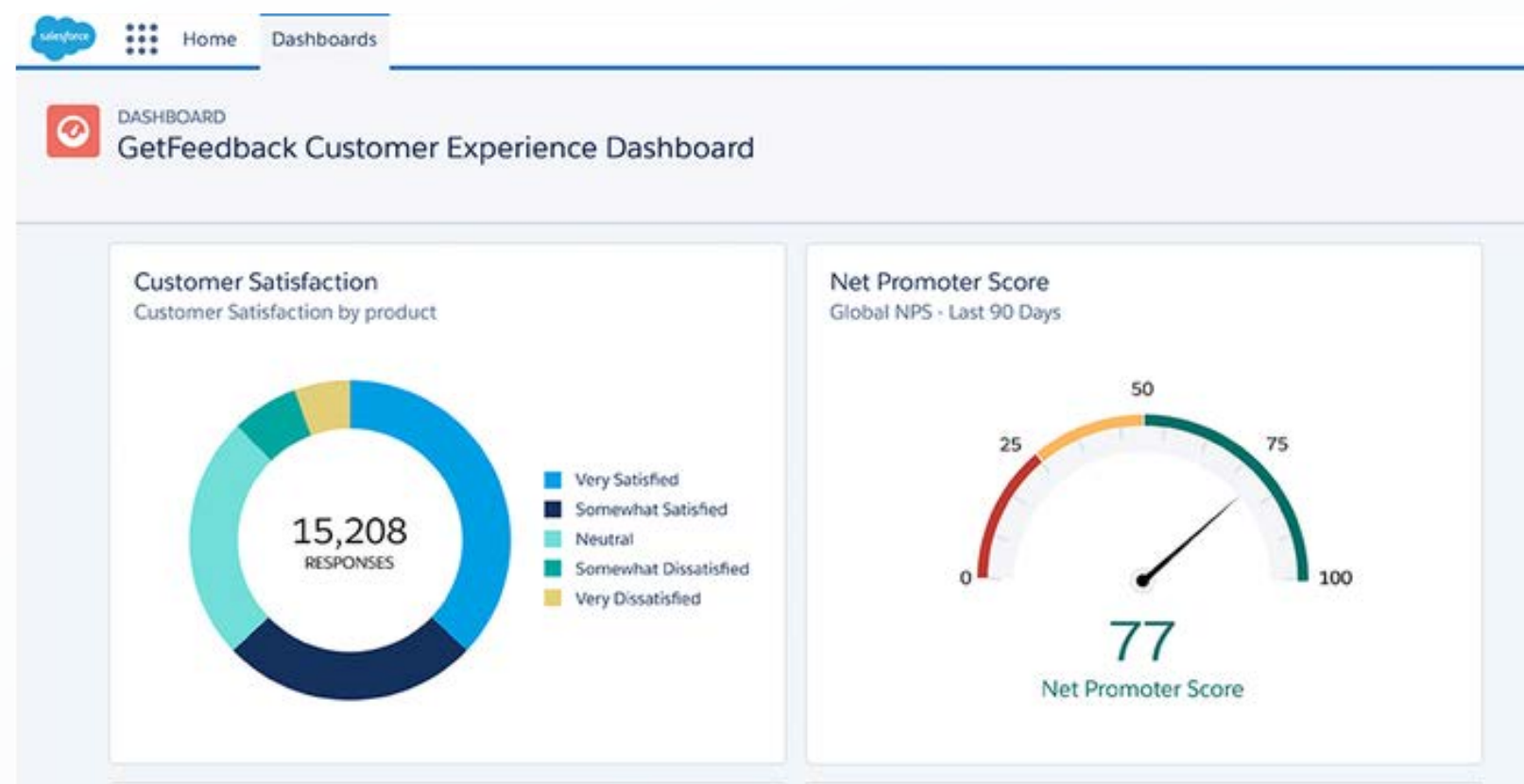






Once customer feedback is collected and mapped to Salesforce, you gain a 360-degree view of the customer. Rather than storing survey results in a cryptic Excel spreadsheet that you soon forget, **customer responses become trackable, actionable data in Salesforce.** With that level of integration, leaders can spot trends and make educated, data-driven decisions that benefit their business and their customers.

For customer-facing teams, measuring NPS with Salesforce also means less guesswork. **They can get a clear picture of customer health by referencing Net Promoter Score on a customer record.** And reporting on overall customer health and satisfaction is as simple as running a report or building a dashboard. Plus, teams can view NPS in the greater context of Salesforce, meaning survey results can be sliced and diced to reveal important trends.







## NPS Survey Cheatsheet

### SEND IT BEFORE AND/OR AFTER

- ✓ Purchase
- ✓ Sign-up
- ✓ Onboarding
- ✓ Renewal
- ✓ Relationship milestones  
(6 months, 1 year, etc.)

### THE RESULTS REVEAL

- ✓ Purchase satisfaction
- ✓ Service satisfaction
- ✓ Onboarding quality
- ✓ Likelihood of renewing or canceling
- ✓ Overall satisfaction

### USE THE DATA TO

- ✓ Understand adoption trends
- ✓ Improve service quality
- ✓ Optimize customer resources
- ✓ Address common customer pain points
- ✓ Report on customer health



## PRO TIP

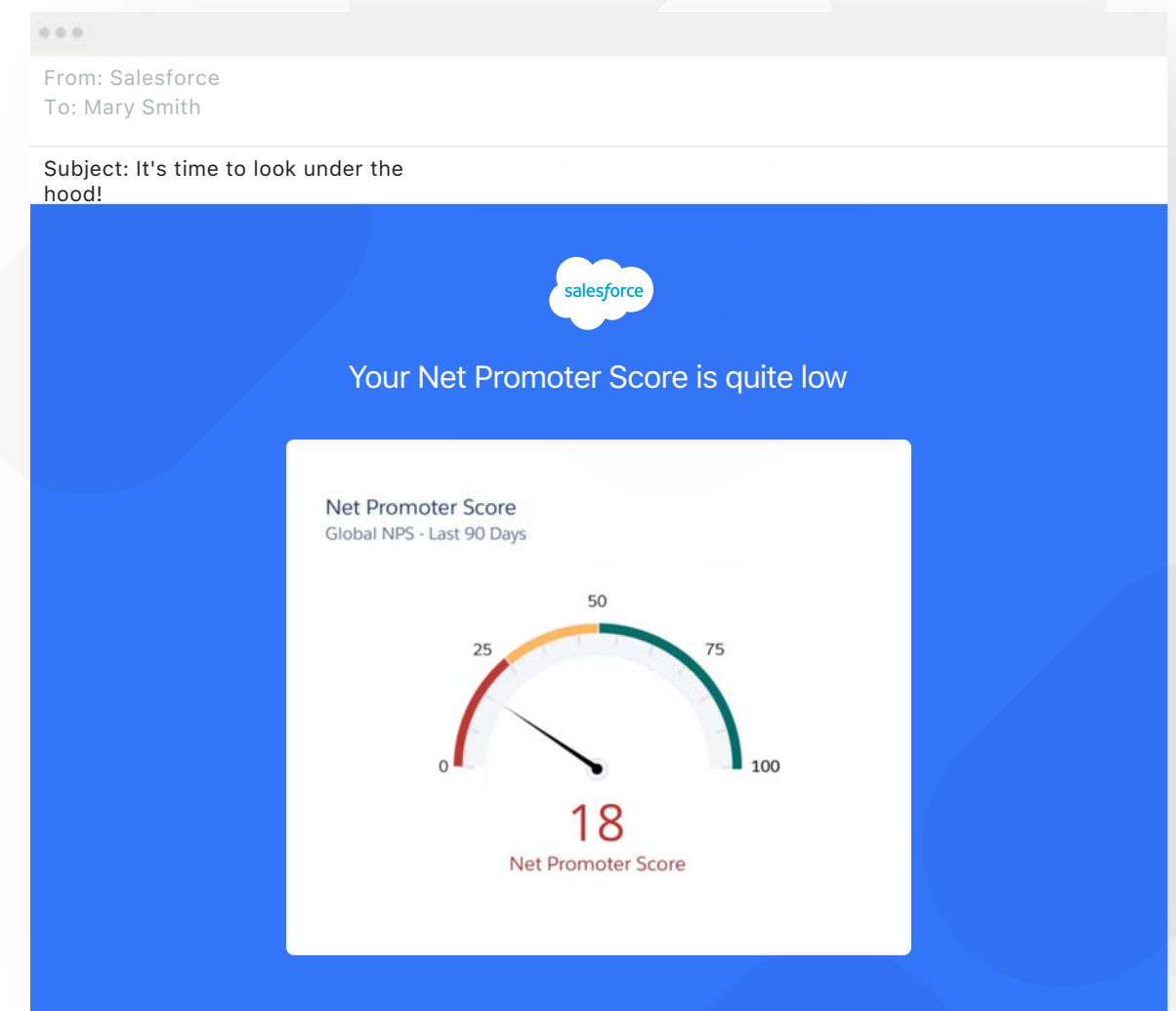
Embedding a survey question into an email can increase your response rate by **up to 240%**. Use GetFeedback's One-Touch Email Surveys to send beautiful NPS emails from Salesforce or your preferred email service provider



# Taking Action with NPS in Salesforce

## Trigger email alerts for poor NPS ratings

Customers expect quick responses to negative feedback, so it's important to sound the alarm right away when things go wrong. Salesforce helps streamline the feedback process so teams can spring into action immediately. You can design a simple workflow to send the account manager or record owner an email alert when you receive a poor rating. This kicks the recovery process into motion immediately.

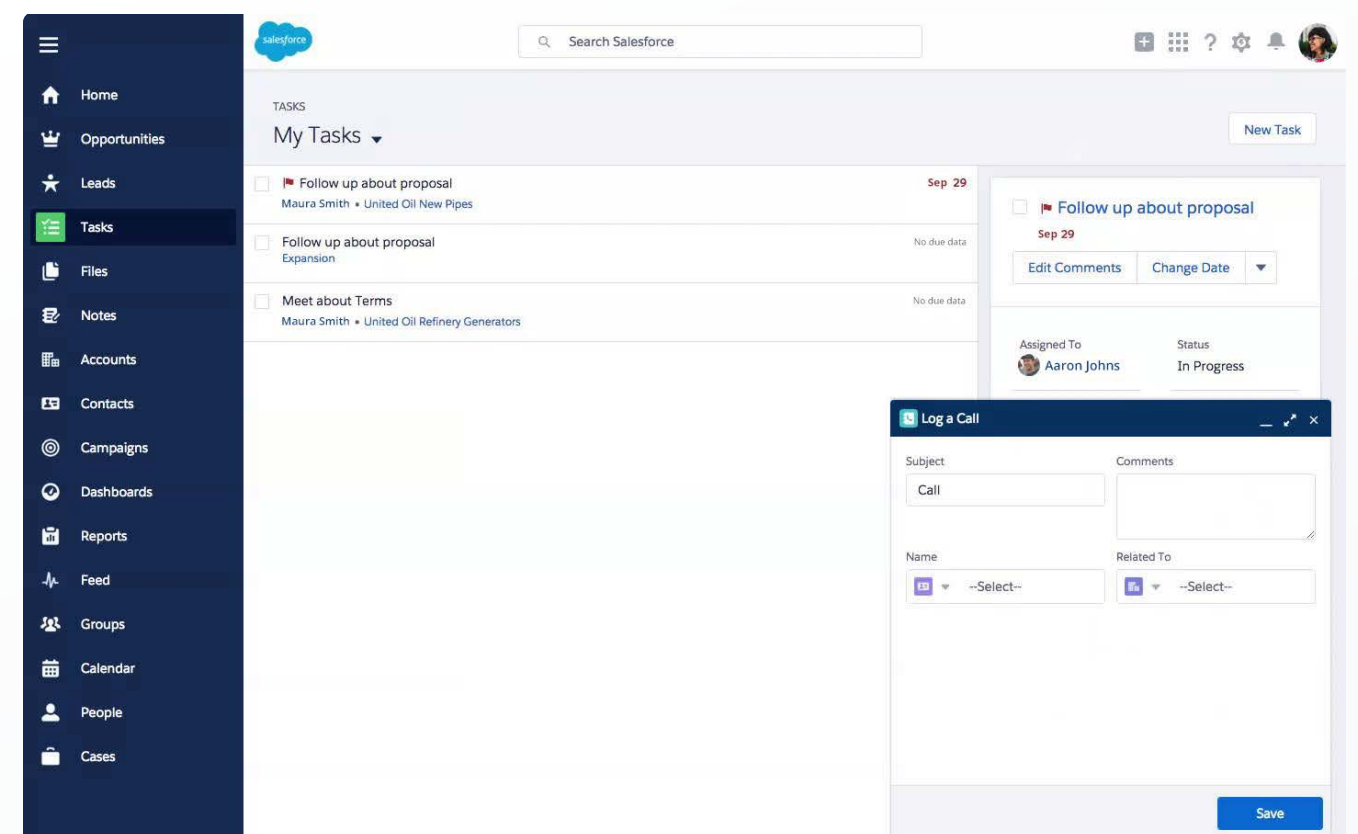




## Create follow-up tasks for record owners

Whether the record owner is a salesperson or a customer success manager, automatic follow-up tasks can accelerate team processes. Say you plan to build a referral program using NPS promoters as your chief advocates. If a customer gives your company a perfect 10, the window of time to follow up may be slim.

**Automated tasks set things into motion**, so you can close the loop quickly and get the most out of each response. Try creating a simple “Contact for referral” task when you gain a new NPS promoter.



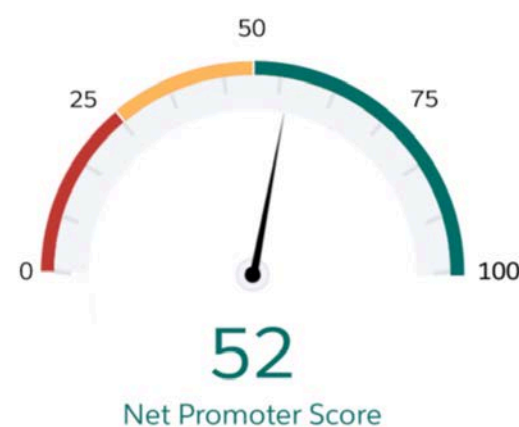


## Add NPS to customer health dashboards

Since NPS is a telling customer experience metric, it deserves a place in your customer health dashboards. When NPS results are mapped directly to Salesforce, you can incorporate that data into your primary dashboards and easily share the results with your team. Plus, **NPS adds a whole new layer of information.** You can create tiles that show Net Promoter Score by customer lifetime value, or keep a running total of Detractors, Passives, and Promoters.

The feedback you collect at each stage of the customer journey breeds **better understanding of current and future customers.** With Net Promoter Score coloring the landscape, your entire organization can make decisions that drive customer loyalty. After all, customer experience isn't just a customer-facing priority—it takes an entire company to get it right. Integrating customer feedback into **Salesforce allows each team to recognize its role in the customer experience.**

Net Promoter Score  
Global NPS - Last 90 Days



Top Performing Agents  
Agent Helpfulness - Last 30 Days

Agent	Average Score
 Julie B.	4.9
 Aziz R.	4.8
 Josh L.	4.6
 Christina A.	4.6

Customer Satisfaction  
Customer Satisfaction



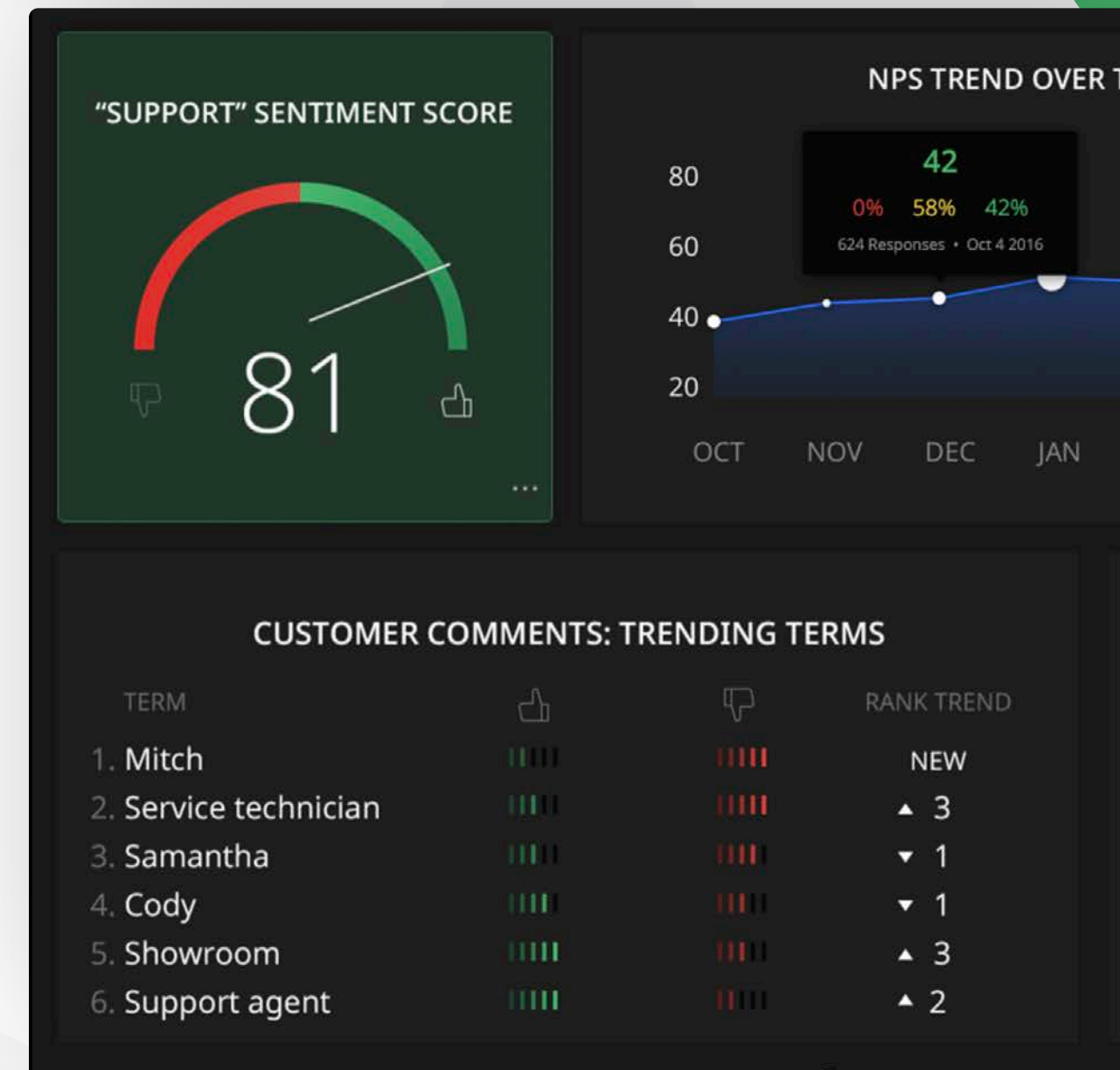


## GetFeedback for Service Cloud

Any company can create branded, mobile-ready customers surveys with GetFeedback, but Salesforce Service Cloud users gain unique benefits from the integration. You can set survey responses to automatically associate with existing customer data in Salesforce. And for deeper insights, it's simple to segment individual customer responses using Salesforce or GetFeedback Analytics.

Customer feedback is the core of all customer-centric organizations. Every company wants to understand customer sentiment, but few have a solution that helps them measure it on a deep level and actually do something with the results. GetFeedback for Salesforce Service Cloud puts you in control of your customer insights, so you can leverage customer feedback across your entire organization.

**Request a Demo:** [getfeedback.com/service-cloud](https://getfeedback.com/service-cloud)



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