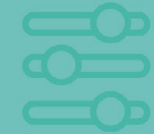# NPS GUIDE

Work flow at Relationwise
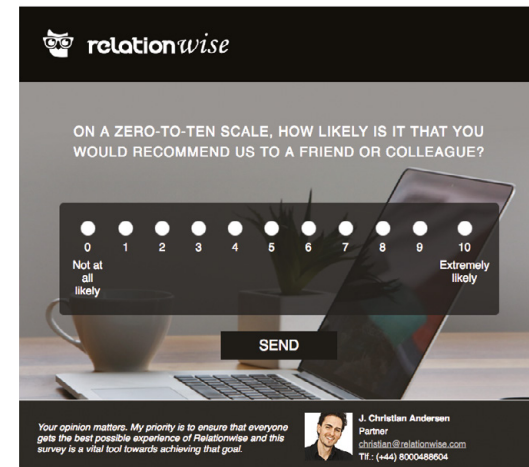
Step 1: The Invitation email and the survey

When we ask a customer to participate in the survey we begin by sending them an email from our CEO in which he asks them to invest 1 minute of their time to participate in the survey.

If the customer wants to participate, he/she clicks on a unique *"Click here"* hyper-link in the email. This takes him/her to a website managed by Relationwise.com.
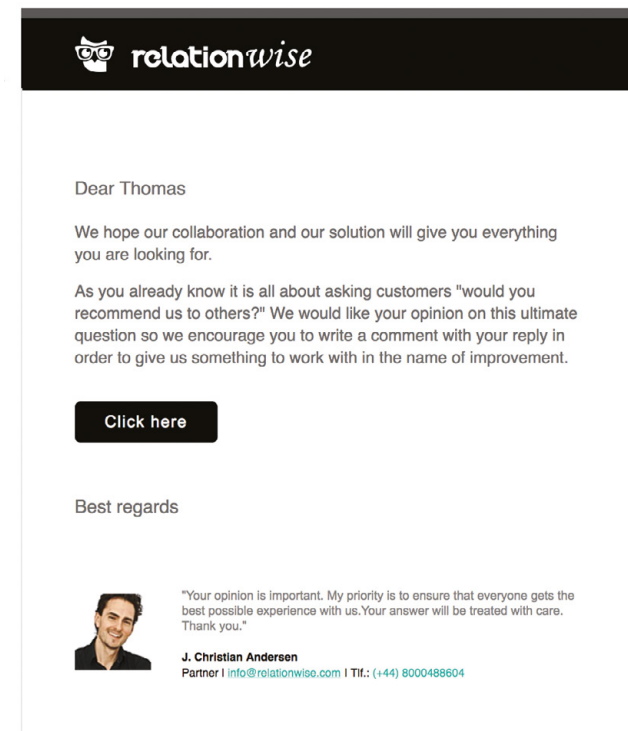
The survey consists of one question and one comment box. After the customer has clicked on the link, the survey will automatically start and it will unfold in two steps:

1) The customer is asked to answer:
"On a zero-to-ten scale, how likely is it that you recommend us to a friend or colleague?"
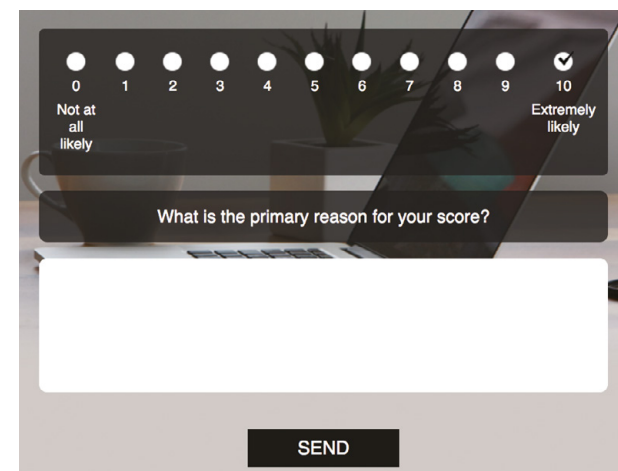
2) A comment box will appear after the customer has answered the question. The customer can now write a free text and press **"send"**.

Step 2: NPS alert function

When the customer has completed the survey, an automatic NPS notification e-mail is send directly to our CEO.

The following types of notifications exist:

- DETRACTOR (NPS 0-6) AND PASSIVE SATISFIED (NPS 7-8) ALERT
- PROMOTER OPPORTUNITY NOTIFICATION (NPS 9-10)

Description of the detractor workflow

The basic idea is that when an unhappy customer is identified, the CEO of RELATIONWISE should contact the customer in order to understand the issues at hand as quickly as possible and within 24 hours. The first step is to understand if there are any immediate actions that can reduce the customer's dissatisfaction with RELATIONWISE. If the RELATIONWISE representative can close the Detractor Alert directly with the customer over the phone, then that is what should happen (more information will be given on how to do this later in this document).

However, it might be necessary to set up a physical meeting with the customer and maybe other people within the customer's organization to further analyze the issues in order to agree upon actions and future solutions.

Step 3: Follow up workflow

There is a small but important link at the bottom of the NPS notification email that we need to click on to take action on the notification.
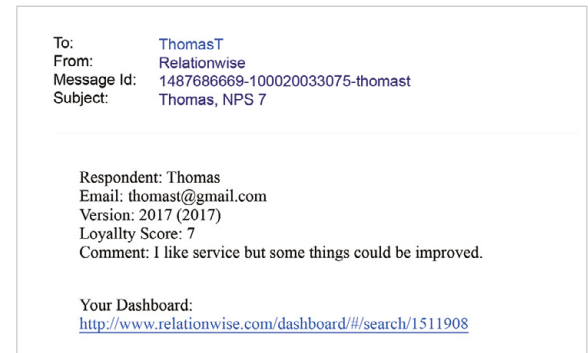
The link leads to a web page where you can change the status of the alert to show that someone is working on the notification. An Alert can have the following three status values:

- **OPEN**
- **WORKING ON**
- **CLOSED**
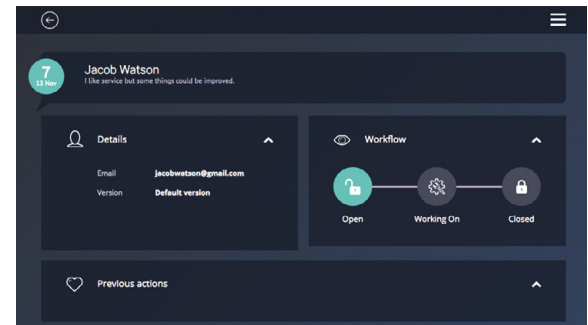
A new screen will appear where you should briefly write which action is going to be taken in the Note field.

It is possible to see who has written which comments in which order in the document log. Therefore, this site will always include a summary of which steps have been taken so you can see the latest information.
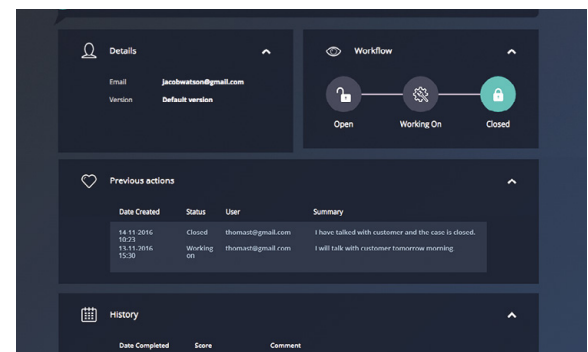
Follow up templates

When we follow up on a notification by calling the customer, it is highly recommended that we utilize the templates below. They will provide guidance for the structure and content of the follow-up call.

If we're going to follow up on a **DETRACTOR** or **PASSIVE** customer, we simply use the guide below: **"Follow up template for Detractor & Passive Alert"**. The template makes it fast and easy to conduct the phone call. We can use the template while we are having the phone call or write a summary afterwards.

If we're dealing with a customer who is a **PROMOTER**, we should simply use the other template: **"Follow up template for Promoter (Sales Opportunity-TRIAD investigation)"** instead.

If we are not able to close the alert over the phone, we can suggest having a physical follow-up meeting.

When calling a Detractor or Passive customer, please remember to briefly write what resolution you have agreed to regarding the customer's pain points.

When we're calling a Promoter sales opportunity notification, please write whether the notification has resulted in a qualified sales opportunity in the concluding comments.

Follow up template for a Detractor or Passive Alert (ROPES-investigation)

Resolve the customer's issue or concern

Obtain permission to discuss further and limit interview time

Probe for root cause with open-ended questions and repeated "why" questions

Explain how the organization will use their feedback

Say thank you for the customer's time and feedback

Interview guide & phone call summary

Resolve Issues	What are the customer's main issues or concerns?	
	How are the customer's issues or concerns resolved?	
	When & by who:	
Obtain permission	Obtain permission to discuss further and limit interview time	
Probe for root causes (5 WHY's)	What is the root causes for the NPS score/comments? (We may ask "why" 5 times to ensure that you get to the bottom of the issue)	
	How satisfied are you with RELATIONWISE's products?	
	How satisfied are you with RELATIONWISE's customer service?	

	How satisfied are you with you RELATIONWISE's contact person (Sales rep)?	
	How satisfied are you with RELATIONWISE's delivery quality?	
Explain how RELATIONWISE will use the feedback	Please explain how RELATIONWISE will use the feedback:	
	Alert closed (Y/N):	
	If No, write date, participants and agenda for the follow up meeting:	
Say thank you	Thank the customers for their time and feedback	
Conclusion (What is the resolution to the customer's pain points (if the issue is closed)?		

Follow-up template for Promoters (Sales Opportunity-TRIAD investigation)

Thank them for the feedback

Reinforce the customers' satisfaction

Identify reasons why their amount of business is not 100%

Assess the sales opportunity

Decide upon next step

Interview guide & phone call summary

Thank customer	Thank the customer for the feedback	
Reinforce customers' satisfaction with RELATIONWISE	Customers' own explanation of why he/she is willing to recommend RELATIONWISE:	
	Maybe the customer has friends, colleagues or business partners they would like to recommend RELATIONWISE to:	
Identify reasons for low share of business	What are the reasons why RELATIONWISE doesn't have 100% of the customer's business:	
Assess sales opportunity	Is it possible to get a higher share of business for the existing service lines/ products (Yes/No and reason)?	
	Is it possible to introduce other RELATIONWISE products to the customer (Yes/No and reason)?	

Decide upon Next Steps	Provide an explanation on how RELATIONWISE will use the feedback:	
	Agreed on a follow-up meeting (Yes / No):	
	If yes, provide the date, participants and agenda:	
Conclusion (Did this result in a qualified sales opportunity?)		

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