



The purpose of this assessment is to understand the progress your company or organization is making against a full potential Net Promoter® system implementation.

The responses to this assessment will help you identify key opportunities to derive full value from the Net Promoter system process.

It is important that you complete this survey for a specific P&L/business unit, as results will vary depending on the nature of the business.

Note: This assessment is not a traditional Net Promoter survey, where the objective is to try to get a quick pulse to understand someone's reasons for answering a certain way and to create a prompt for a closed-loop interaction where a deeper diagnosis will occur. Rather, this survey is meant to be a much more thorough assessment instrument. We apologize in advance for its length, but it is the length of the survey that makes it useful for benchmarking purposes. It will allow us to give you an honest assessment of how you are doing on your Net Promoter journey.

We estimate that it will take you approximately 15 minutes to complete the survey.

If you have any questions about the terminology used in the survey, please visit <http://www.netpromotersystem.com> for more information.

Your name:

Title:

Company Name/Business Name:



Question 1. Industry

- Air Transportation & Services
- Consumer Products
- Financial Services
- Healthcare
- Industrial Goods & Services
- Media
- Nonprofit
- Private Equity
- Retail
- Technology
- Telecommunications
- Consulting
- Other, please specify _____

Question 1a. If you answered Nonprofit, please indicate the nonprofit subsector to which your organization belongs. Otherwise, please proceed to question 2.

- Community and family development
- Education
- Foundations
- Arts
- Environment/sustainability
- Health and wellness
- Employability and economic development (local/national)
- International development
- Other, please specify _____

Question 2. For what type of interactions are you completing the survey: Consumer (B2C) or Channel/Customer (B2B)? Please choose only one, as the way you answer the questions would likely be different for B2C and B2B. If you would like, please complete the survey multiple times for different aspects of your business.

- B2C
- B2B

Question 3. If you answered B2B, how strongly do you agree that: We have accurately identified and surveyed influencers vs. decision makers at our B2B customers/accounts?

- Strongly agree
- Agree more than disagree
- Disagree more than agree
- Strongly disagree



Question 4. Size in revenues for the business for which you are completing this survey?

- <\$500M
- \$500M to less than \$2B
- \$2B to less than \$5B
- \$5B+

Question 5. How many customers does it have?

- <500
- 500-4,999
- 5,000-19,999
- 20,000-49,999
- 50,000-99,999
- >100,000

Question 6. How long ago was NPS introduced to this business?

- <3 months
- 3-6 months
- 7-12 months
- 13-24 months
- More than 2 years, but less than or equal to 3 years
- More than 3 years, but less than or equal to 4 years
- More than 4 years, but less than or equal to 5 years
- >5 years
- Don't know

Question 7. Based on your experience, how likely would you be to recommend adopting NPS to a friend or colleague working in another organization?

- Extremely likely 10
- 9
- 8
- 7
- 6
- 5
- 4
- 3
- 2
- 1
- Not at all likely 0



Question 8. Why would you be likely or unlikely to recommend NPS? For example, if asked about it by a friend, what would you tell them?

Question 9. How successful has NPS been at helping your organization improve its business?

- Completely successful 10
- 9
- 8
- 7
- 6
- 5
- 4
- 3
- 2
- 1
- Not at all successful 0

Question 10. Why do you feel NPS has been successful or unsuccessful at helping your organization improve your business? Can you describe a specific example or two?



Question 11. Top-down/Bottom-up: What type of NPS survey do you conduct? (Please see definitions below and check all that apply.)

Top-down NPS survey

Objective: Identify key differentiators and understand economics of different customer segments

Application: Competitive benchmarking and goal setting (if your organization is a nonprofit, benchmarking vs. comparable organizations)

Methodology: Double-blind survey of market (your customers and your competitors' customers or, for nonprofits, your customers and those of comparable organizations)

Bottom-up relationship NPS survey

Objective: Understand on a periodic basis how your customers feel about your organization overall

Application: Holistic, ongoing/periodic understanding of your customers' views of your organization.

Methodology: Survey your customers on a periodic basis

Bottom-up transactional NPS survey

Objective: Create a learning loop between customers and the front line at a moment of truth

Application: Service recovery, frontline employee learning and continuous improvement

Methodology: Survey your customers following a transaction or experience

- Top-down NPS survey
- Bottom-up relationship NPS survey
- Bottom-up transactional NPS survey
- Don't know

Question 12. If you selected top-down as one of your answers: How many times per year do you conduct your Top-down NPS survey?

- 1
- 2
- 3
- 4
- 5-6
- 7-12
- >12



Question 13. How strongly do you agree: We track competitor NPS results and use them to inform our business/organization strategy? (If your company is a nonprofit, answer for “comparable organizations” instead of competitors)

- Strongly agree
- Agree more than disagree
- Disagree more than agree
- Strongly disagree

Question 14. Bottom-up: Bottom-up relationship—How many questions are on your bottom-up relationship NPS survey?

- 1-2
- 3-5
- 6-10
- 11-20
- >20

Question 15. To what percentage of your customers did you send bottom-up relationship NPS surveys in the most recent 12 months?

- < 20%
- 20-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know

Question 16. What is the average response rate for your bottom-up relationship NPS surveys over the most recent 12 months?

- <5%
- 5-10%
- 11-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know



Question 17. Thinking of all your responses over the most recent 12 months, what percentage of your sales were represented by your survey respondents? (If your company is a nonprofit, please skip this question.)

- <25% of sales
- 25-50% of sales
- 51-80% of sales
- >80% of sales
- Don't know

Question 18. What was the average response rate for your bottom-up relationship NPS surveys in the prior 12 months (not the most recent 12 months, but the 12 months before that)?

- <5%
- 5-10%
- 11-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know
- This was the first year we conducted bottom-up relationship NPS surveys

Question 19. Bottom-Up: Bottom-Up Transactional—What is the basis on which you set sample size for your BOTTOM-UP TRANSACTIONAL Survey? (Check all that apply.)

- We sample a certain percentage of customers who have a given transaction
- We sample so we can deliver a significant response set to a given unit (e.g., branch, frontline team)
- We sample so we can deliver a significant response set to each customer-facing employee
- We sample the maximum number of customers we believe will yield a reasonable volume of detractors we must call back (and/or customers who request a call back)
- Other (specify) _____



Question 20. How many questions are on your bottom-up transactional NPS survey?

- 1-2
- 3-5
- 6-10
- 11-20
- >20

Question 21. What was the average response rate for your bottom-up transactional NPS surveys over the most recent 12 months?

- <5%
- 5-10%
- 11-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know

Question 22. What was the average response rate for your bottom-up transactional NPS surveys in the prior 12 months (not the most recent 12 months, but the 12 months before that)?

- <5%
- 5-10%
- 11-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know
- This was the first year we conducted bottom-up transactional NPS surveys



Question 23. How strongly do you agree or disagree with each of the following statements?

	Strongly agree	Agree more than disagree	Disagree more than agree	Strongly disagree	N/A
Our CFO has certified our customer lifetime value calculations for promoters, passives and detractors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NPS results and improvement plans are directly addressed in our company's annual report and board communications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have been able to calculate the value of Word of Mouth/Referral economics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We accurately incorporate the value of Word Of Mouth/Referral Economics in lifetime customer value calculations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 24. If the average value of a passive customer is \$100 (normalized), how much is a promoter worth to your company?

- <\$100
- \$100-\$200
- \$201-\$300
- >\$300
- Don't know

Question 25. If the average value of a passive customer is worth \$100 (normalized), how much is a detractor worth?

- <(\$50)
- (\$1) - (\$50)
- \$0 - \$49
- \$50 - \$99
- >\$100
- Don't know



Question 26. What percentage of your new customers’ primary reason for selecting your company over the past 12 months was referral, recommendation or positive word-of-?

- <20%
- 20-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know

Question 27. How strongly do you agree or disagree with each of the following statements?

	Strongly agree	Agree more than disagree	Disagree more than agree	Strongly disagree	N/A
We systematically identify detailed root causes that create promoters and detractors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a systematic process to identify/act on cross-departmental or cross-functional changes to improve NPS business outcomes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Actions to improve NPS are differentially focused on the needs of our most important customer segment(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a process for our frontline employees to identify and help prioritize and improve policies that are turning our customers into detractors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 28. In the past 12 months, what percentage of detractors (or those customers who requested a follow-up call) received a follow-up call attempt?

- 0%
- 1-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know



Question 29. In the past 12 months, what percentage of detractors (or those customers who requested a follow-up call) received a follow-up call attempt within 48 hours?

- 0%
- 1-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%
- Don't know

Question 30. Who conducts follow-up calls with detractors? (Check all that apply.)

- CEO and direct reports
- Middle management
- Supervisors and frontline employees
- A specialized team
- Other (specify) _____
- Don't know

Question 31. How strongly do you agree or disagree with each of the following statements?

	Strongly agree	Agree more than disagree	Disagree more than agree	Strongly disagree	N/A
We have a process for systematically mining follow-up calls for feedback	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a formal system to follow up with former respondents regarding actions that have been taken in response to their feedback	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Question 32. If there is at least one person who is more than 60% dedicated to managing and coordinating the NPS process, how many layers of management separate them from the CEO/president?

- 1 (Reports directly to the CEO)
- 2
- 3
- 4
- >4
- We do not have someone more than 60% dedicated

Question 33. To whose organization does the person managing and coordinating the NPS process belong? (This question applies only to respondents who have at least one person who is more than 60% dedicated to managing and coordinating the NPS process.)

- CEO (Chief Executive Officer)
- CMO (Chief Marketing Officer)
- CFO (Chief Financial Officer)
- COO (Chief Operating Officer)
- CSO (Chief Strategy Officer)
- CIO/CTO (Chief Information Officer/Chief Technology Officer)
- Other _____

Question 34. What percentage of your employees would you estimate can explain NPS, why the company feels it is important and the priority actions designed to improve it?

- <20%
- 20-40%
- 41-60%
- 61-80%
- 81-100%



Question 35. How long does it take NPS results to reach the frontline (customer-facing) employee responsible for that customer's loyalty?

- <2 days
- 2 days to 1 week
- 1-3 weeks
- 4-6 weeks
- 7-12 weeks
- >12 weeks
- Does not go to frontline employees
- Don't know

Question 36. When sharing NPS results with frontline employees, what do you share? (This question does not apply to respondents who answered the previous question “Does not go to frontline employees”.)

- Each employee can see verbatims from individual customers they have served (attributed)
- Each employee can see scores from customers they have served (attributed)
- Each employee can see aggregated scores and verbatims from customers they have served (unattributed)
- Each employee can see scores and verbatims aggregated to their team, business unit or function
- Each employee receives personalized coaching on their specific feedback
- We do not share NPS feedback directly with individual frontline employees

Question 37. How strongly do you agree or disagree with each of the following statements?

	Strongly agree	Agree more than disagree	Disagree more than agree	Strongly disagree	N/A
We set specific NPS targets or NPS improvement targets for each major business unit in our company (or for the company overall)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Achieving NPS improvement drives enough of senior executives' incentive compensation to motivate them to focus on it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Achieving NPS improvement drives enough of the compensation for frontline (customer-facing) employees to motivate them to focus on it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Question 38. Our senior business unit executives review and discuss NPS results side by side with financial results.

- Weekly
- Monthly
- Quarterly
- Annually
- Never
- Other _____

Question 39. How strongly do you agree or disagree with the following statement: We have robust tools and information systems in place to support NPS functionality(e.g., surveys, reporting, analytics and alert routing).

- Strongly agree
- Agree more than disagree
- Disagree more than agree
- Strongly disagree
- N/A

Question 40. Do you track employee NPS using the “recommend as a place to work” question?

- Yes
- No
- Don't know

Question 41. Do you track employee NPS using the “recommend as a place to do business with” question?

- Yes
- No
- Don't know

Question 42. Do you systematically correlate employee NPS with customer NPS?

- Yes
- No
- Don't know