The purpose of this diagnostic is to understand the progress your company is making toward a full potential Net Promoter® system implementation.

The responses to this diagnostic 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 diagnostic 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 diagnostic 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. 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 2. Industry

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

Question 3. 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+

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Question 4. 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 5. How long ago was NPS introduced to this business?

- <3 months
- 3-6 months
- 7-12 months
- 13-24 months
- 2-3 years
- 3-4 years
- 4-5 years
- >5 years
- Don't know

Question 6. 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 7.** 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 8.** 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 9.** 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 10.** How strongly do you agree that: We have accurately identified and surveyed influencers vs. decision makers at our B2B customers/ accounts? (This question is for B2B respondents only.)

- Strongly agree
- Agree more than disagree
- Disagree more than agree
- Strongly disagree
Question 11. Top-down/Bottom-up: What type of NPS survey do you conduct? (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
Methodology: Double-blind survey of market (your customers and your competitors’ customers)

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

Don’t know

Question 12. Top-down: 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 strategy?

- 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?

- <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?

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Agree more than disagree</th>
<th>Disagree more than agree</th>
<th>Strongly disagree</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our CFO has certified our customer lifetime value calculations for promoters, passives and detractors</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>NPS results and improvement plans are directly addressed in our company’s annual report and board communications</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>We have been able to calculate the value of Word of Mouth/Referral economics</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>We accurately incorporate the value of Word of Mouth/Referral Economics in lifetime customer value calculations</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>

**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-mouth?

- <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?

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

**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

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**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?

<table>
<thead>
<tr>
<th></th>
<th>Strongly agree</th>
<th>Agree more than disagree</th>
<th>Disagree more than agree</th>
<th>Strongly disagree</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>We have a process for systematically mining follow-up calls for feedback</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>We have a formal system to follow up with former respondents regarding actions that have been taken in response to their feedback</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th></th>
<th>Strongly agree</th>
<th>Agree more than disagree</th>
<th>Disagree more than agree</th>
<th>Strongly disagree</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>We set specific NPS targets or NPS improvement targets for each major business unit in our company (or for the company overall)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Achieving NPS improvement drives enough of senior executives’ incentive compensation to motivate them to focus on it</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Achieving NPS improvement drives enough of the compensation for frontline (customer-facing) employees to motivate them to focus on it</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>
**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