NPS - Process Map

	Plan Survey	Prepare Survey	Run Survey	Collect Data	Analyse Data	Follow Up Actions	Reporting
Tasks	• Set context & scope • Select triggers	• Identify & confirm customers availability • Prepare tools • Prepare Survey (check content, set language, etc.)	• Send individual & group surveys • Identify opt out responses • Send reminders in 1 week, 1 month, 6 months	• Data are exported from ClickTools • Data are imported & processed in MS Excel	• Identify data required for running the process (sending dates, type of responses, etc.) • Group & classify responses • Map responses in terms of facts which exceed expectations and facts which need improvements	• Describe follow up actions together with ownership and KPIs to follow. • Improve NPS process, upgrade methodology	• Generate reports
Roles	**Sales Support** Technical Support **Sales** **Management**	**Sales Support** **Technical Support** **Sales** Management	**Sales Support** Technical Support Sales Management	**Sales Support** Technical Support Sales Management	**Sales Support** Technical Support **Sales** Management	**Sales Support** **Technical Support** **Sales** **Management**	**Sales Support** Technical Support **Sales** **Management**
Tools & Methodologies	• Group meetings • MS Excel, MS PowerPoint, Adobe PDF, SalesForce	• Group meetings, 1:1 meetings • MS Excel, Adobe PDF, SalesForce, ClickTools	• MS Excel, ClickTools	• MS Excel, Adobe PDF, SalesForce, ClickTools	• Group meetings, 1:1 meetings • MS Excel, MS PowerPoint, Adobe PDF, SalesForce	• Group meetings, 1:1 meetings • MS Excel, MS PowerPoint, Adobe PDF, SalesForce	• Group meetings, 1:1 meetings • MS Excel, MS PowerPoint, Adobe PDF, SalesForce
Findings ✓ It's Ok ! It's NOT Ok. ▲ HIGH RISK.	✓ The meetings are regular and their format is stable. ▲ Data available are incomplete and incorrect.	✓ Technical Support for SalesForce is available. ! Data stored on different tools are not synchronized. ! Sales support and availability varies from person to person. ▲ Technical Support for ClickTools is missing. ▲ Manual data management.	! Working procedures are missing. ▲ Technical Support for ClickTools is missing. ▲ Manual data management.	✓ Technical Support for SalesForce is available. ! Working procedures are missing. ▲ Technical Support for ClickTools is missing. ▲ Automatic data transfer between ClickTools and SalesForce is partial. ▲ Manual data management.	✓ The meetings are regular and their format is stable. ! Mapping responses is an off-line process (time consuming, requires physical presence).	✓ The meetings are regular and their format is stable. ! Follow up tasks do not have clear ownership. ▲ Upgrades need resources and planning.	✓ The meetings are regular and their format is stable. ! Reports are manually generated. ! Important business KPIs are not considered. ▲ Local results are not shared with other teams, which could face the same issues.