

FD - P13 bis. Net Promoter Score

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Version Control

Version	Date	Description	Author
v.1	01.03.2021	Creation	Josiane Peytraud

1. Functional Process

Process Overview

NPS process aims to collect, store and improve Solvay Net Promoter Score (NPS).

GBUs have to conduct Customers interviews, where, among other key questions, will gather the Customer feedback.

After Interviews results analysis, GBUs have to develop an Action Plan to improve the overall results. We might say this process has two main steps:

- Management of the Customer Interviews
- Internal Action Plan Definition.
- Surveys are elaborated & built Outside of CRM => Tool = NPX provided by SatMetrix
- Interview results are collected and stored

To be able to send a survey, we need to

- create a Campaign with record type "NPS Campaign".
- add the contacts as Campaign members.
- we leave around 3 weeks to sales managers to review the Campaign Members in order to update, add or reject them
- send the survey in CRM => this will create as many NPX Survey records as Campaign Members with status "Added" or "Nominated"

Then the Informatica batch will capture those NPX survey Records and send the information to NPX tool. This batch runs every 2 hours.

NPX will send the survey to the contacts, collect the answers and analyse them.

When the customer will answer, the Informatica batch will send the answer to CRM and update NPX Survey Records with those answers.

NPS is the Process

NPX is the tool which manages NPS

SatMetrix is NPX Editor

NPS Score is the answer to one question: Will you recommend Solvay to another company ?

The answer is from 1 to 10

9 - 10 = Promoters

0 - 6 = Detractors

7 - 8 = Neutral or Passive

NPS Score = % of promoters - % of Detractors

[Frontline NPS: Playbook](#)

2. Data Model & security

Main objects

1. **Account:** Standard Salesforce Object to manage the information about the Customer

2. **Contact:** Standard Salesforce Object to manage the contact person from the Customer
3. **Campaign:** Standard Salesforce Object
4. **Campaign Member :** Standard Salesforce object
5. **NPX Survey:** Custom Salesforce object to manage the NPX Survey information
6. **NPX Survey Record:** Custom Salesforce object to manage the exchanged between CRM and NPX tool
7. **Task:** Standard Salesforce Object
8. **Feedback Call:** Custom Salesforce object on Core, to manage the additional call done with contact after he answered the survey.
9. **Meeting Report:** Custom Salesforce object on Icare, to manage the additional call done with contact after he answered the survey.

VOC record Security Model

Who can create?	A VOC record can be created only by integration, a GBU data steward or a system admin
Who can see?	Visibility of VOC records depends on the record itself (Visibility field). A VOC record can be Shared, GBU restricted or Confidential.
Who can update?	A VOC record can be created only by integration, a GBU data steward or a system admin
Who can delete?	A VOC record cannot be deleted. Only the System Administrator (SBS) can delete a VOC record.

VOC action Security Model

Who can create?	Any user accessing a VOC record can create a new VOC action
Who can see?	Any user accessing a VOC record can see a VOC action
Who can update?	Any user accessing a VOC record can update a VOC action
Who can delete?	A VOC action cannot be deleted. Only the System Administrator (SBS) can delete a VOC action