

Whitepaper:

# Customer Experience Insights and Actions

An Operational CX Program with  
Feedback Reasons, Customer Pulse and AI

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## Introduction

Customer experience (CX) programs generate the greatest value when organizations are able not only to collect customer feedback, but to understand the underlying reasons and translate these insights into meaningful actions. This whitepaper builds on the foundation established in the Playbook for Operational CX, where the focus was on creating a continuous, automated, and operational NPS-based CX program.

While the first Playbook described how to measure and act on customer experience in daily operations, this second Playbook — Playbook for CX Insights and Actions — takes the next step:

### **How do you turn feedback into deep insights and insights into real, measurable improvements?**

Across the customer journey, organizations often struggle with challenges such as:

- too much unstructured feedback
- lack of clarity on what drives satisfaction or dissatisfaction
- information overload from free text comments
- difficulty prioritizing actions
- slow or inconsistent follow-up
- limited ability to identify trends and root causes

This Playbook provides concrete guidance on how to overcome these challenges by combining proven NPS practices with modern analytical methods, operational processes, and — where relevant — AI-driven enhancement.

AI is not a replacement for good CX practices, customer-centric culture, or meaningful dialogue with customers. But AI can significantly accelerate and strengthen your understanding of feedback. With technologies such as Microsoft Azure AI (via Power Dashboards/Power BI) and the new **nps.today AI Feedback Assistant**, organizations can uncover patterns, summarize large volumes of feedback, and identify actions faster and with greater precision.

In this Playbook, we introduce a structured approach to turning customer feedback into insights, and insights into both individual recovery actions and broader transformation initiatives. You will learn how to:

- categorize and interpret customer feedback effectively
- enrich and summarize feedback with AI
- identify the strongest drivers of satisfaction and dissatisfaction
- prioritize which actions will have the greatest impact
- use insights for proactive customer management
- support business transformation based on facts rather than assumptions

Just as the Playbook for Operational CX described how to keep your “customer radar” always on, this Playbook explains how to interpret the signals from that radar — and how to act on them in a way that drives customer loyalty, operational excellence, and business growth.

If you have not yet read the Playbook for Operational CX, you should do that first.

## A few words about nps.today

nps.today enables organizations to measure, understand, and act on customer experience across the entire customer journey. With a focus on operational NPS and simplicity, the platform integrates directly into existing customer engagement systems, making customer feedback a natural part of daily workflows rather than an isolated process.

The nps.today solution supports a wide range of touchpoints through omni-channel surveys, automated triggers, and native integrations to CRM, service, sales, and contact center systems. This ensures that customer-facing employees have immediate access to feedback, pulse scores, and response history exactly where they work.

While the Playbook for Operational CX described how automation, plug-ins, and data flows make it possible to run a continuous CX program, this Playbook highlights the next step: turning feedback into insights and transformation. Here, nps.today provides additional capabilities through two complementary approaches:

- **AI-powered enrichment via Power Dashboards** using Microsoft Power BI and Azure AI or the customer’s preferred AI service
- **The nps.today AI Feedback Assistant**, a specialized CX/NPS-trained engine that helps identify patterns, summarize insights, and recommend actions directly inside the platform

Together, these tools support organizations in moving from basic measurement to a structured and insight-driven CX practice — without complexity, without new systems to learn, and without compromising the customer-centric simplicity that defines the nps.today methodology.

## From Feedback to Insights

Collecting customer feedback is only the first step in a mature CX program. Real value emerges when organizations can understand *why* customers feel the way they do — and translate that understanding into decisions that improve both customer satisfaction and business performance.

In many organizations, the challenge is not a lack of feedback, but rather a lack of structure around how to interpret and act on it. As volumes increase through rNPS and tNPS surveys, teams often face:

- fragmented feedback across tools and systems
- unstructured free-text comments that are hard to analyze
- unclear links between customer ratings and underlying causes
- difficulty separating isolated incidents from recurring issues
- lack of visibility into trends across touchpoints

- uncertainty about which actions will have the greatest impact

To address these challenges, CX programs must move from simple measurement to an integrated *insights pipeline* — a structured approach that transforms raw feedback into actionable knowledge. This pipeline typically consists of five steps:

### **1. Collect feedback**

Through continuous rNPS (classic NPS) and tNPS (CSAT and CES) surveys across relevant touchpoints, ensuring data is timely, representative, and linked to customer context.

### **2. Structure the data**

Using respondent-based reason mapping and metadata to give shape to otherwise unstructured information. This allows organizations to categorize feedback, identify patterns, and focus on what matters most.

### **3. Enrich the feedback**

Through analytical tools such as dashboards, trend views, and — where beneficial — AI-based enrichment. Techniques such as automated reason mapping, sentiment analysis, and summarization help reduce complexity and highlight the strongest drivers of satisfaction.

### **4. Interpret insights**

Turning structured and enriched data into understanding. This includes identifying themes behind detractor feedback, understanding what promotes loyalty, and uncovering inconsistencies across journeys, regions, products, or teams.

### **5. Drive action**

Using insights to guide both 1:1 follow-up (recovery actions) and broader transformation (product, process, or service improvements). Actions should be traceable, prioritized, and monitored over time.

Each step plays a critical role. Without structured data, insights remain vague. Without enrichment, patterns are hard to see. Without interpretation, teams remain reactive. And without action, even the best insights lose their value.

AI now strengthens steps 3–5 — not by replacing human judgement, but by accelerating understanding. With tools such as Microsoft Azure AI (via Power Dashboards) and the nps.today AI Feedback Assistant, organizations can uncover themes in minutes rather than hours, validate hypotheses, and prepare for meetings with a clearer view of trends and improvement opportunities.

In the following sections, we explore these steps in detail and provide guidance on how organizations can build a robust approach to feedback understanding, insight generation, and action — based on the combination of best practice NPS methodology and modern AI-enhanced analysis.

## Reason Mapping : Foundation of Understanding

Customer feedback contains two essential elements: a rating and a reason. While the rating indicates *how* the customer feels, it is the reason that reveals *why*. Without understanding the reason behind each rating, organizations risk misinterpreting the feedback, prioritizing the wrong initiatives, or overlooking patterns that are critical for customer loyalty and operational performance.

Reason Mapping is the process of categorizing customer feedback into meaningful themes that help organizations identify drivers of satisfaction and dissatisfaction. It is the foundation of nearly all insight and action work in modern CX.

### WHY REASON MAPPING MATTERS

Across industries, organizations consistently discover that ratings alone rarely tell the full story. A “6” could be caused by slow response time, an unclear invoice, a missing feature, or a delivery issue — and the required action differs in each scenario.

Reason Mapping enables organizations to:

- determine the primary drivers behind high and low ratings
- identify recurring issues across teams or touchpoints
- avoid guessing which improvements matter most
- increase the validity of insights across the customer journey
- support both operational follow-up and strategic decision-making

Without structured reasons, customer feedback becomes harder to use, harder to prioritize, and harder to translate into meaningful action.

### MANUAL REASON MAPPING (the traditional approach)

Historically, many organizations relied on manual coding of free-text comments. This can work when volumes are low or when feedback is highly specialized. However, manual mapping presents several challenges:

- it is time-consuming
- consistency varies across coders
- insights are delayed
- large volumes become impractical

Manual coding can still be relevant in selected situations — for example in early phases where categories need to be discovered — but it is rarely scalable as the main approach.

### RESPONDENT-BASED REASON MAPPING (best practice)

The most effective and efficient approach is to let customers select the primary reason for their rating directly in the survey. This approach is simple, fast, and highly reliable.

#### Advantages of respondent-based reason mapping:

- **80% of respondents** typically provide a reason when presented with clear, relevant options

- customers choose the reason that matters most to them
- consistency is extremely high because categorization happens at the moment of feedback
- organizations avoid the delays and complexity of manual coding
- valid insights can be generated even without free-text comments

Respondent-based reason mapping also reduces the need to add multiple additional questions. By designing a strong set of reasons aligned with the customer journey, organizations can gain deep insights through a short, simple survey.

### Examples of good reason sets

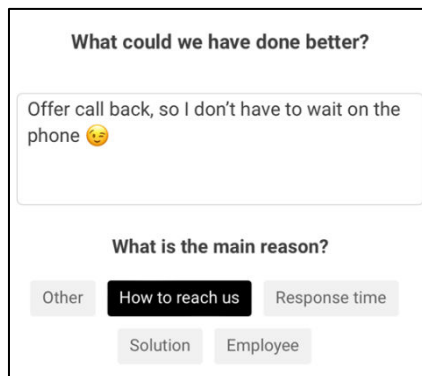
For example, in a customer support survey, reasons might include:

- Response time
- Communication
- Solution provided
- Professionalism
- Ease of interaction

Whereas in a sales or onboarding context, reasons might differ:

- Product fit
- Price or commercial terms
- Clarity of information
- Expectations vs. reality
- Overall guidance

The key is to ensure that reasons reflect the customer’s perspective — not internal terminology.



The image shows a survey interface. At the top, it asks "What could we have done better?". Below this is a text input field where a respondent has typed "Offer call back, so I don't have to wait on the phone 😊". Underneath the text field is another question: "What is the main reason?". Below this question are five buttons: "Other", "How to reach us", "Response time", "Solution", and "Employee". The "How to reach us" button is highlighted in black, indicating it is the selected reason.

*In this example from a customer service survey, you can see 5 main reasons, and the respondent has explained the rating reason with a comment and selected the main reason from the reason categories.*

## AI-BASED REASON MAPPING

With the growing volume of free-text comments in continuous CX programs, organizations increasingly use AI to enrich or support Reason Mapping. Through the nps.today Power Dashboards integration, Microsoft Azure AI (or the customer's preferred AI service) can automatically categorize free-text input.

AI-based Reason Mapping can:

- supplement respondent-selected reasons
- categorize comments for respondents who did not select a reason
- detect emerging themes that are not yet part of existing reason sets
- help refine or update existing categories
- support periodic in-depth analysis (e.g., quarterly or monthly reviews)

### Best practice for combining human and AI inputs

Organizations typically achieve the best results by:

1. Using **respondent-based reasons** as the primary source of truth
2. Using **AI-based categorization** as a supplement, especially for:
  - refining categories
  - understanding nuances in free-text
  - identifying new themes to add to future surveys

This combined approach ensures both **high validity** (customer's own categorization) and **high coverage** (AI categorizing comments without a chosen reason).

## AVOIDING COMPLEXITY: LESS IS MORE

A common challenge in CX programs is information overload — too many questions, too many categories, too many variations. Reason Mapping, when implemented well, helps simplify the complexity.

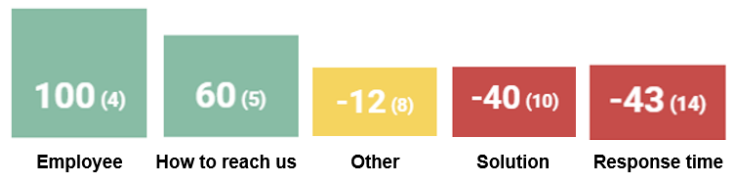
The objective is not to capture every detail, but to capture the *most important* reasons in a structured and consistent way. AI makes it possible to explore more nuance when needed — but the best practice for daily operations remains simplicity.

## HOW REASON MAPPING PREPARES THE ORGANIZATION FOR ACTION

Reason Mapping is not just an analytical exercise. It is the mechanism that enables:

- prioritized follow-up
- fast recovery actions
- early detection of recurring issues
- cross-team alignment
- clearer communication with customers
- stronger decision making in product, service, and process design

*This simple dashboard from a customer service survey, shows the NPS score for each main reason, with the number of responses in brackets.*



In the next sections, we build on this foundation to explain how both traditional analysis and AI-enabled insights turn customer feedback into meaningful and consistent action.

## Free Text Analysis & AI Enrichment

Free-text comments remain one of the most valuable sources of insight in any CX program. While the rating and the selected reason explain *what* the customer feels and *why* at a high level, the free-text comment adds nuance, context, and emotional depth. Customers often use this space to describe their expectations, frustrations, or appreciation in their own words — giving organizations direct access to the customer’s voice.

However, free-text also presents challenges:

- comments delivered in multiple languages
- comments vary widely in length and detail
- respondents use different terminology
- recurring themes may appear in slightly different forms
- data volumes grow rapidly in operational CX programs
- manual review becomes difficult and inconsistent

To turn free-text into actionable insights, organizations need a structured approach supported by analytical tools — and increasingly, by AI.

### WHY FREE TEXT MATTERS

Free-text comments provide context that cannot be fully captured through rating or reason selection alone. They offer insight into:

- the specifics of the customer’s experience
- detailed explanations behind key reasons
- emotional tone and urgency
- mentions of particular people, products, or processes
- suggestions for improvements
- areas where expectations were unmet

This content is essential for understanding the nuance behind customer ratings and for designing meaningful actions — both at the individual level (recovery) and at the strategic level (transformation).

### TRADITIONAL APPROACHES TO FREE TEXT ANALYSIS

Historically, organizations relied on one of two methods:

#### Manual reading and interpretation

Suitable for low volumes or highly specialized contexts, but with limitations:

- time-consuming
- inconsistent between reviewers
- difficult to scale
- insights often slow to surface

### **Basic keyword counting or filtering**

Useful for simple analysis, but often too superficial. Customers may use synonyms or describe issues indirectly, leading to incomplete or misleading insights.

These traditional approaches provide some value but struggle in continuous, high-volume CX programs where speed, consistency, and depth are crucial.

### **AI-BASED ENRICHMENT: A NEW LAYER OF UNDERSTANDING**

With the integration of Microsoft Azure AI — or the customer’s preferred AI service — via nps.today Power Dashboards, organizations can now enrich free-text data with advanced AI analysis. These features help uncover structure and meaning in large volumes of comments.

The most commonly used techniques include:

#### **Sentiment Analysis**

Determines whether the emotional tone of a comment is positive, negative, or neutral. While the rating itself already expresses satisfaction, sentiment analysis can reveal:

- the intensity of the customer’s feelings
- emotional cues (frustration, confusion, delight)
- discrepancies between rating and tone (e.g., rating 7 with angry tone)
- opportunities for more nuanced follow-up

#### **Key Phrase and Topic Extraction**

AI identifies recurring phrases and themes across comments, even when customers use different wording. Examples:

- “response time”, “slow reply”, “long wait” → Communication speed
- “price too high”, “expensive”, “not worth the cost” → Price perception
- “missing information”, “unclear explanation”, “miscommunication” → Clarity of communication

This helps organizations understand the specific drivers behind each reason category and refine their improvement initiatives.

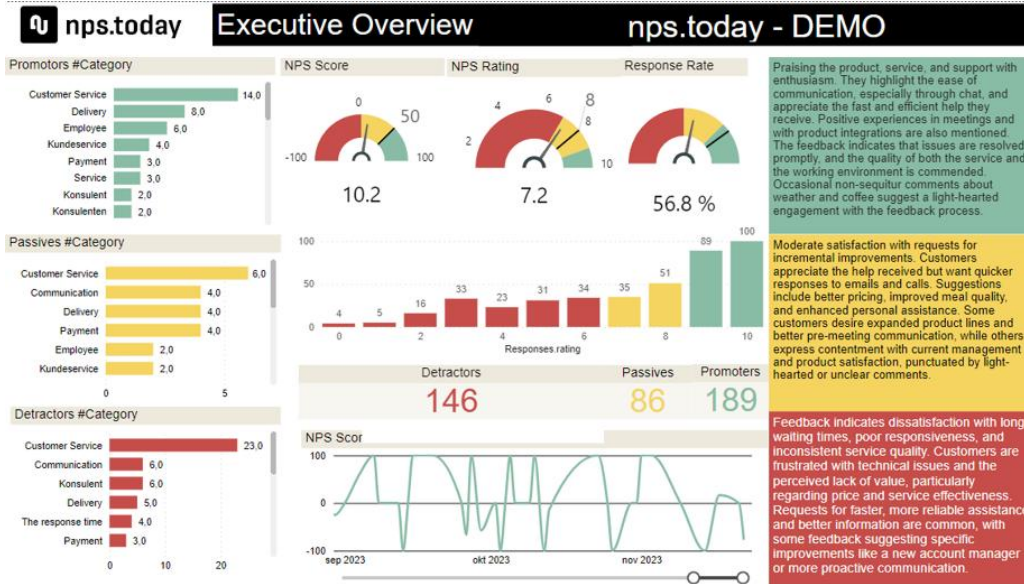
#### **Summaries of Feedback Themes**

AI can generate natural-language summaries of what customers are saying. Examples:

- “What were the main reasons detractors gave in Q2?”
- “How do promoters describe our onboarding experience?”
- “What themes increased the most in the past month?”

- “Please summarize responses from promoters, passives and detractors”

These summaries help teams prepare for meetings, workshops, or transformation discussions without manually reviewing large volumes of data.



This Power Dashboard example shows on the right how AI has summarized all free text feedback from promoters, passives and detractors into a short overview of experiences.

## COMBINING REASON MAPPING WITH AI ENRICHMENT

Reason Mapping and AI analysis each serve different purposes. Together they create a comprehensive understanding:

- **Reason Mapping** provides *structure* and *consistency*
- **AI enrichment** provides *depth*, *nuance*, and *summaries*

Best practice is to use:

- **respondent-based reasons** as the primary categorization
- **AI-based analysis** to enrich free-text or categorize missing reasons

This hybrid model ensures both accuracy and completeness — especially valuable in high-volume operational CX programs.

Rating	Responses.userComment	Translation	Classification	Sentiment
3	Hvorfor tager i ikke telefonen!	Why don't you answer the phone!	Customer Service Category:[Customer Service]	negative
4	Ventetiden er alt for lang!!	The waiting time is way too long!!	Customer Service Category:[Customer Service]	negative

This Power Dashboard example show both translation, Classification compared to Category and the Sentiment added by AI

## **AVOIDING OVER-ANALYSIS**

While AI can process large amounts of text quickly, it is important to avoid unnecessary complexity. More data does not automatically mean better insights.

Effective use of free-text analysis and AI is guided by:

- clear objectives
- defined categories
- focus on the main drivers
- operational relevance
- actionable outputs

The purpose is not to analyze everything — but to understand what matters most.

## **PREPARING THE ORGANIZATION FOR INSIGHT-DRIVEN ACTION**

Free-text enriched with AI gives organizations a powerful toolbox for understanding why customers think and feel the way they do. This prepares the organization to:

- detect emerging issues early
- improve 1:1 follow-up
- identify cross-team patterns
- prioritize improvements
- inform product, service, and process development
- support strategic decision-making

In the next sections, we build on this insight foundation to explore how organizations turn these findings into effective individual follow-up (recovery actions), account-level pulse strategies, and broader business transformation.

## **Turning Insights into Actions**

Understanding customer feedback has little value unless it leads to action. The purpose of a mature CX program is not only to analyze what customers are saying, but to use those insights to improve individual experiences and to drive broader, long-term improvements in products, services, and processes.

Organizations often collect a wealth of feedback — from rNPS, tNPS, free-text comments, reason codes, metadata, and customer pulse. However, the challenge is rarely a lack of data. Instead, the real difficulty is determining what to act on, in which order, and at which level of the organization.

To address this challenge, insights should be translated into action through a structured approach. In practice, this typically involves two complementary tracks:

### **TWO TRACKS OF CX ACTIONS**

#### **1) Individual Response Actions (Recovery)**

These actions are taken directly in response to a specific piece of feedback — often from a detractor or a customer who expresses dissatisfaction.

Recovery actions aim to:

- resolve issues quickly
- prevent escalation or monetary loss
- preserve or restore the relationship
- demonstrate that the organization listens and responds
- identify opportunities for cross-functional improvements

Recovery actions are operationally focused and time-sensitive. They rely on metadata such as customer value (ABC), product type, account owner, or recent history to prioritize which responses require immediate attention.

### **STRATEGIC TRANSFORMATION ACTIONS (Business Improvements)**

These actions focus on the underlying patterns revealed across many responses. They aim to:

- improve processes and touchpoints
- close experience gaps
- resolve recurring issues
- improve offerings, communication, or service standards
- support cross-functional transformation

Transformation actions require a deeper understanding of the feedback landscape and benefit strongly from structured Reason Mapping, trend analysis, and AI-based enrichment.

### **FROM RAW DATA TO ACTIONABLE INSIGHTS**

To turn insights into action, organizations must be able to answer questions such as:

- *Which issues affect the most customers?*
- *Which problems occur repeatedly in a specific touchpoint?*
- *Which themes drive detractor feedback this quarter?*
- *Which areas are improving or declining?*
- *Where is recovery needed immediately, and where is transformation needed?*

This requires a combination of:

- well-designed surveys
- meaningful categories
- reliable metadata
- dashboards and analytical tools
- and—when applicable—AI-based support

These elements provide the clarity and prioritization needed to take the right actions in the right order.

## THE ROLE OF AI MOVING FROM INSIGHTS TO ACTION

AI does not replace human judgement in CX programs, but it significantly accelerates understanding by:

- summarizing large volumes of free-text
- identifying dominant themes
- confirming or challenging hypotheses
- grouping feedback meaningfully
- highlighting reasons behind trends
- suggesting where action will be most impactful

With the **nps.today AI Feedback Assistant**, insights can be generated in seconds. Instead of manually searching through datasets or dashboards, teams can simply ask:

- *“What are the three primary reasons for poor experiences this month?”*
- *“How has feedback in our onboarding journey changed over the past quarter?”*
- *“Which actions should we consider for our enterprise customers?”*

By making insight generation faster and more accessible, AI reduces the time between feedback and action — strengthening both recovery and transformation.

## BUILDING A CULTURE OF INSIGHT-DRIVEN ACTION

An organization succeeds when insights are consistently used as the basis for decisions.

This requires:

- cross-functional sharing of insights
- regular review of trends and patterns
- clear ownership of actions
- alignment on what should be improved and why
- disciplined follow-up on both recovery and transformation

In this Playbook, the following sections will explore each action track in depth:

- **Recovery Actions (1:1 follow-up)**
- **Customer Pulse–Based Actions**
- **Business Transformation Based on Real Insights**

Each section builds on the Insight Pipeline described earlier and shows how both operational and strategic improvements can be achieved using structured feedback, best practice methods, and modern AI tools.

### Recovery Actions (1:1 follow-up)



Not all customer feedback requires broad organizational change. A significant portion of value in any CX program comes from addressing individual experiences — especially when a customer expresses dissatisfaction or highlights an unresolved issue. Recovery actions are the immediate, targeted responses taken directly on the basis of a

single customer’s feedback. Executed well, they can transform negative experiences into positive ones, prevent escalation, and significantly improve loyalty.

### WHY RECOVERY MATTERS

Even small issues can become costly if left unaddressed. Recovery actions help organizations:

- resolve issues before they escalate into complaints or churn
- reduce operational costs by catching problems early
- demonstrate responsiveness and accountability
- restore trust after negative experiences
- influence long-term customer loyalty
- identify systemic issues through repeated patterns

### PRIORITIZING RECOVERY USING METADATA

Examples of useful metadata:

- customer value (ABC classification)
- revenue and profitability
- product or service category
- customer pulse trend

### TYPES OF RECOVERY ACTIONS

Recovery actions may include:

- **Direct outreach:** phone call, email, personal message
- **Mass outreach:** direct mail, marketing flow
- **Corrective actions:** resolve issue, clarify misunderstanding, provide information
- **Goodwill gestures:** discounts, credits, escalated support
- **Planned follow-up:** address at next scheduled interaction
- **Internal follow-up:** inform responsible teams, align with account plans

Recovery actions should be clearly defined and implemented with automation.

Customer ABC	Hard detractors (0-2)	Medium detractors (3-4)	Light detractors (5-6)	Passives (7-8)	Promoters (9-10)
A Customers	C-level call	Manager call	Responsible call	Marketing flow mail	Manager call
Timing	24 hours	24 hours	48 hours		One week
B Customers	Manager call	Responsible call	Marketing flow mail		
Timing	24 hours	48 hours			
C Customers	Marketing flow mail				
Timing	48 hours				

*This example table show how recovery actions are categorized and prioritized based on both rating and metadata*

### AI SUPPORT FOR RECOVERY

AI supports faster and more contextualized 1:1 follow-up.

Examples of useful prompts:

- “What do we already know about this customer’s recent issues?”
- “Which patterns are visible for this account?”
- “What action is most likely to resolve the issue?”

## **BEST PRACTICES FOR EFFECTIVE RECOVERY**

Effective organizations typically:

- follow up quickly
- use the customer’s own words
- personalize outreach
- document in CRM
- close the loop
- analyze patterns
- share learnings

## **Customer Pulse–Based Actions**

Customer Pulse aggregates rNPS, tNPS, reasons, and metadata into a unified, longitudinal view of customer health.

## **WHY CUSTOMER PULSE MATTERS**

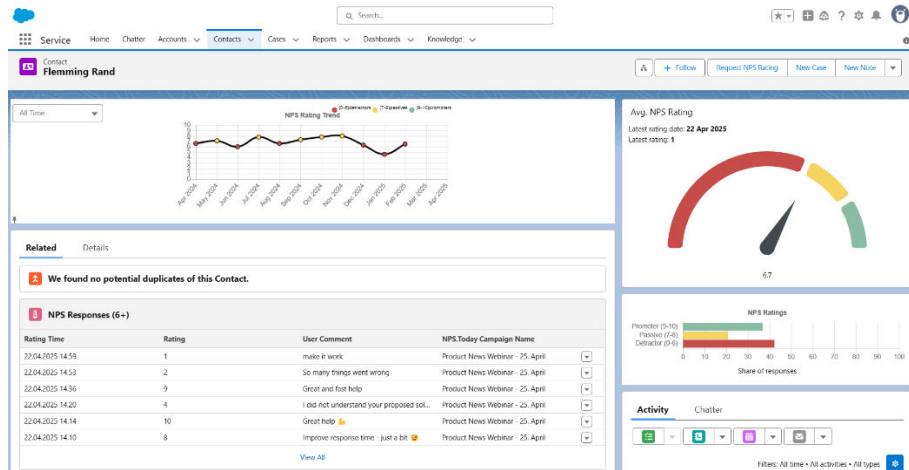
Pulse helps organizations:

- detect risks early
- understand long-term trends
- monitor account health
- prioritize follow-up
- support account planning
- align teams around factual insights

## **FROM RATINGS TO PULSE**

Customer Pulse typically includes:

- rating trends
- detractor/passive/promoter mix
- dominant themes
- segment/ABC classification
- value and lifecycle metadata
- cross-touchpoint results



*This is an example of a Customer Pulse overview in Salesforce*

## PULSE-BASED ALERTS AND ACTIONS

Examples include:

- pulse below target → customer follow-up
- NPS below SLA → escalation
- six-month average below threshold → improvement plan
- three consecutive detractors → root cause analysis
- declining trend before renewal → proactive outreach

## AI SUPPORT FOR PULSE ANALYSIS

AI helps by summarizing:

- why pulse declined
- what themes changed
- which issues dominate in specific segments
- recommended next steps

## PULSE AS A STRATEGIC INDICATOR

Pulse supports:

- churn prevention
- QBRs
- project health
- leadership reporting
- resource prioritization
- transformation planning

## Business Transformation Based on Real Insights

Transformation requires identifying and addressing structural, recurring issues.

### FROM ISSUES TO THEMES TO TRANSFORMATION

Transformations often arise from:

- recurring detractor themes
- journey-based gaps
- expectation mismatches
- process or system bottlenecks
- service inconsistencies
- product limitations

### EXAMPLES OF TRANSFORMATION AREAS

Examples include:

- improved communication
- redesigned onboarding
- clearer pricing
- better digital flows
- delivery process adjustments
- product enhancements
- billing improvements

### AI AS ACCELERATOR FOR TRANSFORMATION

AI accelerates transformation by:

- summarizing high-volume feedback
- identifying cross-functional patterns
- surfacing root causes
- suggesting high-impact improvements

### FROM INSIGHTS TO ROADMAP

A strong roadmap contains:

- prioritized themes
- problem definitions
- clear initiatives
- responsible owners
- expected outcomes
- KPIs (NPS, Pulse, journey KPIs)
- ongoing tracking

AI can assist with summaries, explanations, and periodic digest updates.

## Dashboards, Reporting & Decision Support

### POWER DASHBOARDS AS ANALYTICAL CORE

Dashboards support:

- filtering and segmentation
- drill-downs
- combining CX with business data
- identifying drivers
- visualizing development
- spotting segment-specific patterns

### THE ROLE OF AI IN REPORTING

AI enhances reporting through:

- summaries of trends
- explanations of movements
- identification of drivers
- leadership-ready formulations
- automated monitoring

## AI Feedback Assistant: Deep Dive

### WHAT IT IS

- a CX/NPS-trained AI engine
- embedded in nps.today
- trained on LLM (Large Language Model)
- designed for Campaign Managers
- compatible across all campaigns and time periods

### WHAT IT CAN DO TODAY

- identify top issues
- summarize promoter, passives and detractor themes
- explain pulse changes
- recommend actions
- consolidate ratings, reasons, comments

### SUPPORT FOR BOTH RECOVERY AND TRANSFORMATION

#### Recovery:

- quick context
- suggested actions
- consistency in outreach

**Transformation:**

- cross-team patterns
- trend explanations
- improvement themes
- prioritized recommendations

**WHAT COMES NEXT (FUTURE CAPABILITIES)**

- weekly digest insights
- theme monitoring
- proactive alerts
- scenario analysis
- watchlists

## Setting Up an Insights-Based Transformation Program

**ESTABLISH AN INSIGHT CADENCE**

- weekly/bi-weekly reviews
- monthly cross-functional meetings
- quarterly workshops
- leadership briefs

**BUILD CROSS-FUNCTIONAL OWNERSHIP**

Teams may include:

- product
- marketing
- sales
- service
- delivery
- operations
- customer success

**INTEGRATE INSIGHTS INTO PLANNING**

Use insights to shape:

- roadmaps
- backlogs
- sales process and tools
- service improvements
- onboarding redesign
- communication updates

## USE AI AS PREPARATION ENGINE

AI supports preparation for:

- meetings
- workshops
- QBRs
- strategy discussions

## Conclusion and Final Advice

Turning feedback into insights — and insights into action — forms the essence of a mature CX program.

Success comes from combining:

- NPS fundamentals
- reason mapping
- pulse analytics
- consistent follow-up
- cross-functional collaboration
- AI-enhanced interpretation

**Think big, start small — but always act on insights.**