

Whitepaper:

# Playbook for Operational CX based on NPS

Best practices and recommendations

By Peter Tranberg Møller



## Table of Contents

Table of Contents .....	2
Introduction .....	3
A few words about nps.today.....	3
Operational CX/NPS.....	3
NPS Based Customer Experience Surveys .....	4
How to listen across the Customer Journey .....	5
Relational NPS Program (rNPS) .....	6
Transactional NPS Program (tNPS).....	7
The Single Scale Customer Pulse .....	8
Customer Pulse and Proactive CX Management .....	8
Automations and Integrations (closed loop).....	10
Plug-in's and CX for CRM.....	11
KPI's, Dashboarding, AI, Analytics and Reporting.....	13
Your Transformation Program .....	16
Implementation, Adoption, and Customer Success .....	17
Your CX Program Success .....	17

## Introduction

This document is dedicated to organizations seeking inspiration on how to design and drive a successful customer experience, customer satisfaction, and customer loyalty program. The best practices in this playbook are based on many years of experience from organizations running NPS-based CX programs implemented with nps.today.

The objective is to show how traditional customer satisfaction surveys can be transformed into a continuous, operational program — one that becomes an integrated part of your daily business. While this playbook maintains its foundation in the NPS method, it reflects the modern CX landscape, where AI increasingly enhances the way organizations understand customer feedback and uncover actionable insights.

If you are not familiar with NPS, please start here: <http://nps.today/resources/what-is-nps/>

## A few words about nps.today

nps.today makes it easy to measure, understand, and act on customer experience to increase customer satisfaction and loyalty. Our plug-in solutions work inside your existing IT systems, enabling a fully automated and operational CX setup. With nps.today, you can measure experience and loyalty across all touchpoints, analyze results, and take relevant actions — all within the systems your teams already use.

nps.today also provides modern AI-enhanced capabilities that support data enrichment, summarization, and deep insight generation. These tools strengthen feedback interpretation while remaining fully optional, ensuring that every organization can adopt AI in a way that fits its CX maturity.

## Operational CX/NPS

nps.today helps organizations shift from *analytical and project-based CX* to *operational and program-based CX*. Instead of measuring and reacting to customer feedback occasionally in standalone initiatives, you maintain a continuous customer feedback radar — always active, always listening.

This approach enables you to detect early signals of dissatisfaction, proactively prevent churn, and identify opportunities for enrichment and loyalty building. Customer experience becomes part of daily business operations rather than ad-hoc projects that interrupt daily workflows.

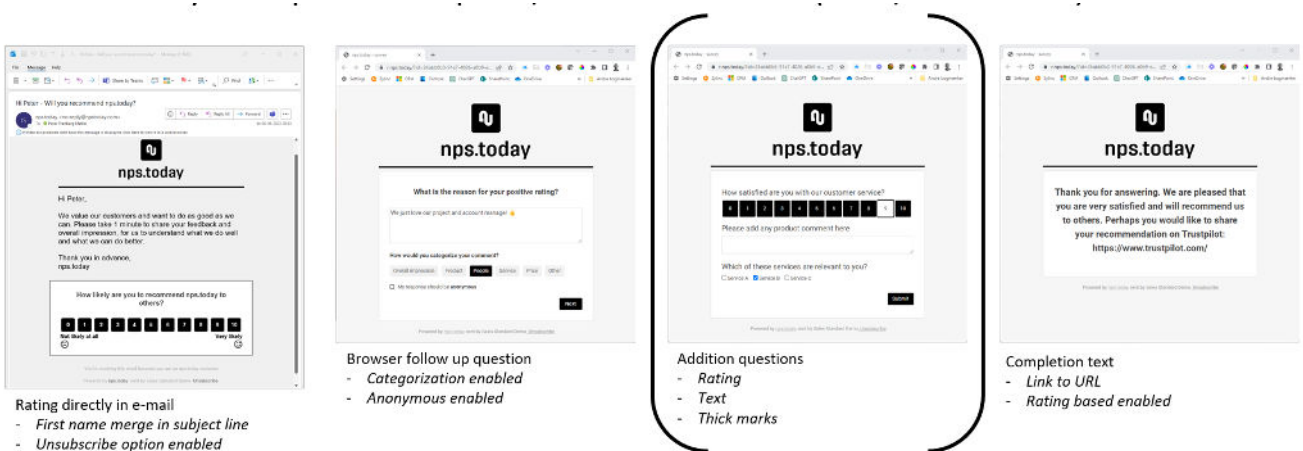


## NPS Based Customer Experience Surveys

With an NPS-based program, you can measure customer experience, satisfaction, and loyalty using the same simple method. All surveys begin with a 0–10 rating question. Surveys should be short, precise, and easy to answer — especially via email surveys where the initial rating can be submitted directly from the email.

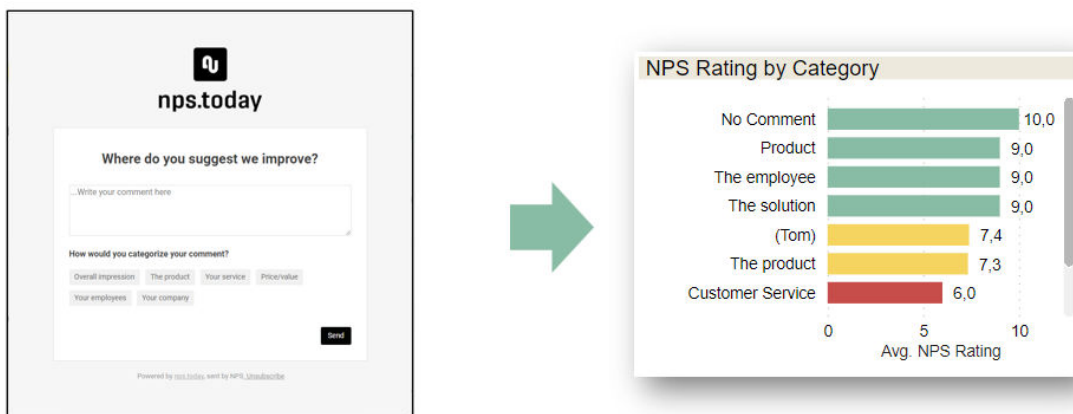
After the rating, respondents receive a follow-up question. This can include:

- A free-text comment
- A rating reason (categorization)
- Additional questions (up to five) with the nps.today Basic Module



To enhance interpretability, you may also include rating-based closing texts, links to additional resources, or encouragement to share public reviews.

By adding rating reasons (categorization), you will be able to spot and report on emerging trends and patterns and identify pains or business drivers to be prioritized when you improve customer experience.



While many customers provide reasons directly through categorization buttons or comments, organizations can now use AI to enrich or supplement survey insights.

In the nps.today Power Dashboards you can visualize AI based:

- feedback categorization (reason mapping)
- sentiment

However, nps.today still considers *customer-selected* reasons the most accurate and valid source for actionable insights. AI acts as a supplement — not a replacement for customer voice.

nps.today is a dedicated customer experience platform and offers many features to help you perform survey excellence with easy implementation. These include:

- Omni-channel surveys (E-mail, SMS, link, QR, embed, pop-up)
- Cross-platform support (CRM, service, contact system etc.)
- Branded and easy to respond to surveys
- Timing your survey sending's (send out delay)
- Antispam by throttling out and doublet control
- Anonymous, opt-out and consent collection
- Alerts
- Over 30 languages supported (more can be added)
- And much more

## How to listen across the Customer Journey

Keeping your customer radar switched on enables customers to share feedback when *they* find it relevant — not only when you decide to ask. By listening continuously across the journey, you ensure that:

- critical touchpoints are monitored
- experiences are captured in real-time
- recovery actions happen before dissatisfaction escalates

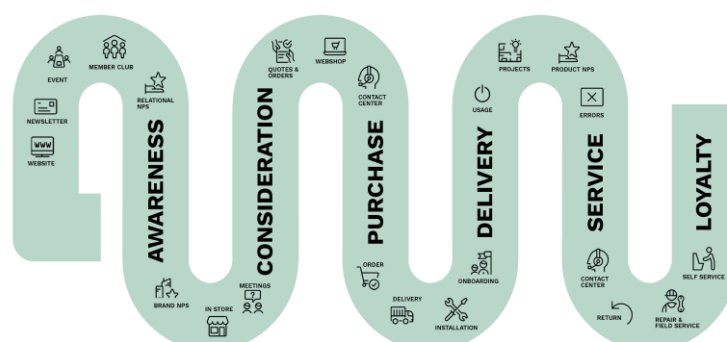
You typically work with two types of surveys:

### Relational NPS (rNPS)

Measures the overall relationship and loyalty.

### Transactional NPS (tNPS)

Measures the experience in specific interactions (CSAT or CES-style).



### Correct timing is key.

For example:

- rNPS should not be sent too early in the relationship
- tNPS must reflect the actual customer experience timing (e.g., allow delay after shipment so the parcel has arrived)

You can also use more *passive feedback options* to reduce survey fatigue:

- QR codes
- website feedback buttons
- passive prompts in newsletters
- pop-up or embedded surveys
- feedback in apps or digital services

With both rNPS and tNPS running continuously, survey excellence and anti-spam controls become critical to maintain relevance and avoid over-surveying.

## Relational NPS Program (rNPS)

Traditional surveys often include too many questions, leading to lower response rates, data pollution and survey fatigue. The NPS philosophy is to keep the primary question in focus — the rating and the reason behind it.

An operational rNPS program delivers the strongest value when:

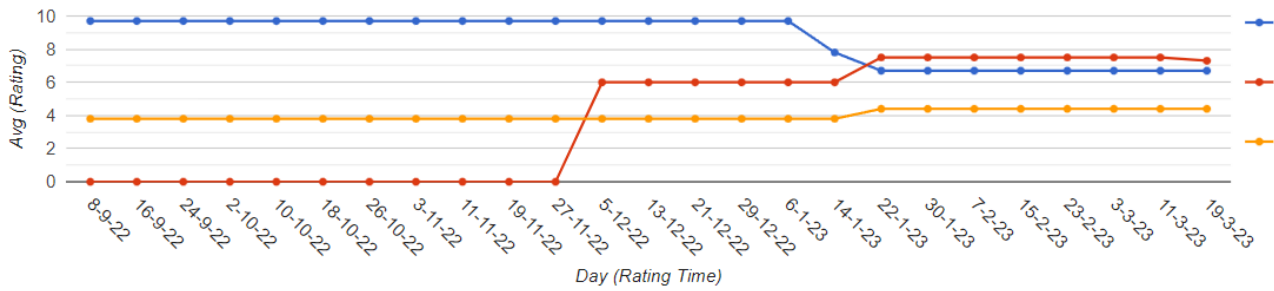
- **all relevant customers are asked**, not only selected ones
- **feedback is collected continuously**, not annually
- **responses are used operationally**, not only analytically

If you have 20,000 customers, asking 100 each day gives real-time insight into shifts in customer satisfaction tied to organizational changes, product updates, or service developments.

A continuous rNPS program allows for:

- live monitoring
- faster action
- better trend analysis
- improved benchmarking

When running a continuous relational NPS program, your NPS graph becomes *alive* — evolving every day and giving you actionable input all the time, not only once a year. This allows you to detect developments earlier and understand whether they are driven by internal changes, market trends, or customer expectations.



nps.today has helped many organizations automate continuous rNPS programs through seamless integrations to their customer systems, ensuring timely triggers, accurate data, and an operational setup that requires minimal or no manual effort.

## Transactional NPS Program (tNPS)

Measuring customer experience in individual transactions is one of the most effective ways to understand what actually drives satisfaction and loyalty — and where things go wrong. When implemented correctly, tNPS does not only give you valuable insights but can increase sales and save significant costs by catching issues early, long before they escalate into rework, complaints, or even lost customers.

The most common setting for continuous tNPS surveys is customer service or support (the contact center), where feedback enables fast recovery and improvements in both processes and communication. However, the value of transactional feedback goes far beyond service and support.

Customer feedback can be a powerful tool in almost any part of the customer journey. For example:

- **Sales:** A salesperson receives objective feedback on a quote, including an indication of the customer's likelihood to buy. This allows the salesperson to refine the offer and prevent losing the sale to a competitor.
- **Delivery and operations:** A delivery manager learns early about issues in a delivery before they become costly or difficult to fix — enabling proactive intervention and a better overall customer experience.
- **Onboarding:** Early-stage customers can highlight friction points, enabling teams to remove barriers quickly and reduce churn risk.
- **Service visits or field work:** Immediate feedback helps identify patterns and ensures consistency in quality across technicians or service teams.

These examples illustrate how tNPS provides real-time intelligence that enables teams to act faster, reduce friction, and maintain momentum throughout the customer journey.

One example from a home-building company demonstrates this well: they measure customer experience 11 times during the entire building process. Each time a deviation or negative experience is detected, corrective action is taken immediately. At the same time, the accumulated feedback provides a detailed NPS trend per touchpoint, supporting benchmarking and continuous improvement.



These are simulated data

By embedding tNPS into your operational workflows, you ensure that every critical interaction is monitored — and that issues are resolved before they grow into costly and time-consuming problems.

## The Single Scale Customer Pulse

Traditional survey setups force customers to navigate different scales, question types, and layouts depending on the channel and system used. This creates friction and reduces response accuracy.

nps.today’s Single Scale Smart Question Flow unifies measurement across the entire customer journey — and turns feedback into operational CX.

Most companies rely on multiple survey tools, multiple channels, and multiple question types. The result? A fragmented customer feedback experience and complex internal reporting that never scales.

With nps.today you can use any measurement scale — but we have spent more than a decade proving the value of a **single, unified 0–10 NPS scale** combined with our **simple red–yellow–green response logic**.

Promoters, passives, and detractors are universally understood across the business, enabling immediate insight and action.



nps.today’s Single Scale Smart Question Flow ensures consistent experience for customers and a structured, comparable dataset for your organisation. It is the foundation that makes omni-channel CX, AI-driven insight, and scalable action possible.

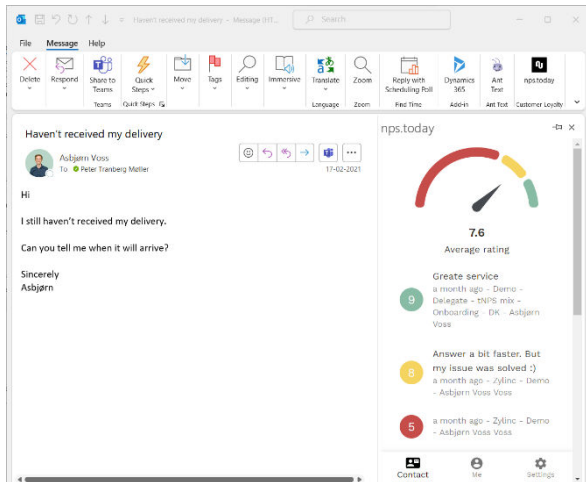
## Customer Pulse and Proactive CX Management

Most organizations focus primarily on individual responses. This is valuable — but only scratches the surface of what is possible. Proactive customer experience management requires a broader view that includes:

- historic feedback
- multi-touchpoint insights
- customer-level pulse scores
- trend-based alerts

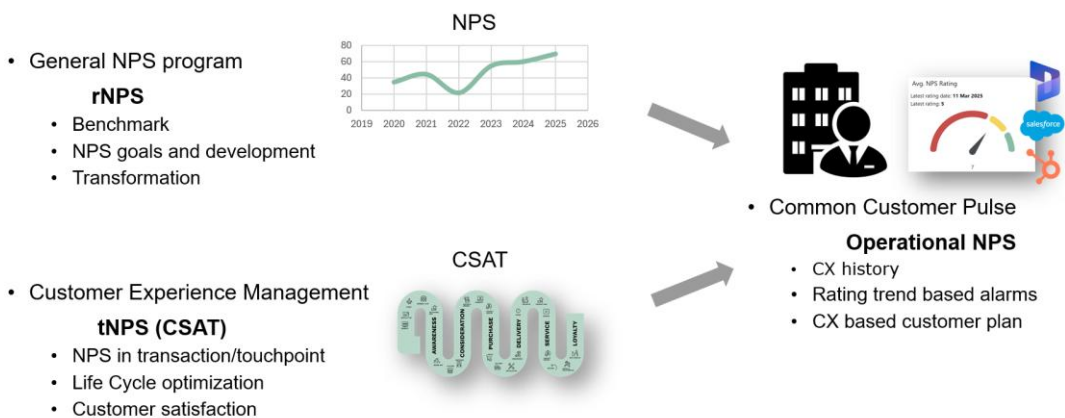
With customer history visible directly in CRM, Outlook, support systems, or contact center tools, employees can act with much better context. Instead of responding only to the latest rating, they can see how the customer relationship is developing over time.

For example, seeing that a customer gave a “5” rating last month — or even more importantly, noticing that the customer’s average Customer Pulse has dropped below your internal target (e.g., 9) — will naturally trigger increased attention in the next interaction. It may also influence the customer’s account plan and prompt proactive outreach before dissatisfaction grows into costly issues or churn risk.



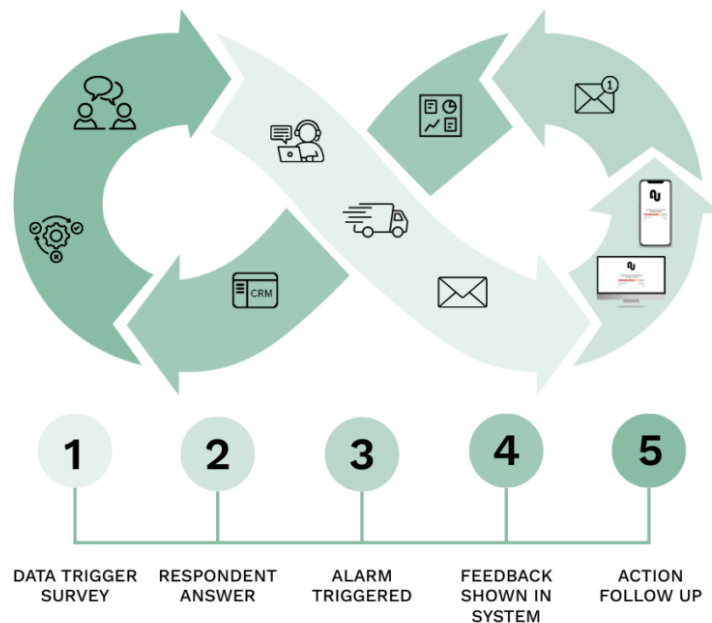
By combining individual response insights with a broader pulse metric, connected to internal KPI's/targets, your teams can shift from reactive case handling to proactive relationship management — identifying early warning signs, prioritizing the right customers, and acting before small issues escalate.

Imagine combining all customer experience responses — both rNPS and tNPS — into a single Customer Pulse automatically calculated inside your CRM. This gives you a customer-level CX score that supports proactive actions and prioritized alerts based not only on recent ratings, but also on overall rating targets, customer history, segment (e.g., ABC), revenue, and other key data.



## Automations and Integrations (closed loop)

Making your CX program operational across both rNPS and tNPS requires solid system integrations and automated processes. Without automation, a continuous CX program quickly becomes too time-consuming and inconsistent to maintain.



### Triggers

Survey triggers ensure that feedback is collected at the right time, based on real customer relationship and activity.

Examples include:

- sending rNPS automatically based on customer start date or an annual cycle field
- triggering tNPS surveys after a sales activity, a delivery milestone or case status

Some systems support triggers natively through flows, scripts, or automation builders. If this is not possible, alternative report push with automatic upload or custom made pull solutions can activate a survey.

### Response data back

For CX to become operational, employees must be able to see customer feedback *where they already work*. This often includes CRM, service management platforms, Outlook, the contact center system or other customer engagement systems.

Response data can be:

- fully transferred into the customer system (Dynamics, Salesforce, Zendesk etc.)
- used and displayed in native system objects, views, graphs and dashboards
- or displayed in other systems through the embedded nps.today Feedback App

This ensures that customer-facing employees always have access to historic ratings, comments, and Customer Pulse data preferably in real time — enabling more informed, empathetic and proactive interactions.

### **Follow-up and recovery actions**

Automated follow-up flows help ensure that no important feedback is missed. These can include:

- AI suggested recovery actions
- alerts to responsible employees, teams or managers
- messaging notifications
- automatic reopening of cases
- creating new follow-up tasks for detractors
- reminders and escalations if deadlines are not met
- alerts based on customer pulse rather than individual rating
- trigger automatic follow up actions e.g. with marketing flows

For organizations with advanced setups, follow-up actions can be enriched with additional metadata such as segment (ABC), revenue, churn risk, or historic pulse trends.

### **AI-enhanced automation**

AI can further strengthen operational workflows by:

- identifying prioritized themes in feedback
- flagging emerging patterns earlier
- summarizing customer sentiment across key segments
- providing recommendations for the actions most likely to improve satisfaction

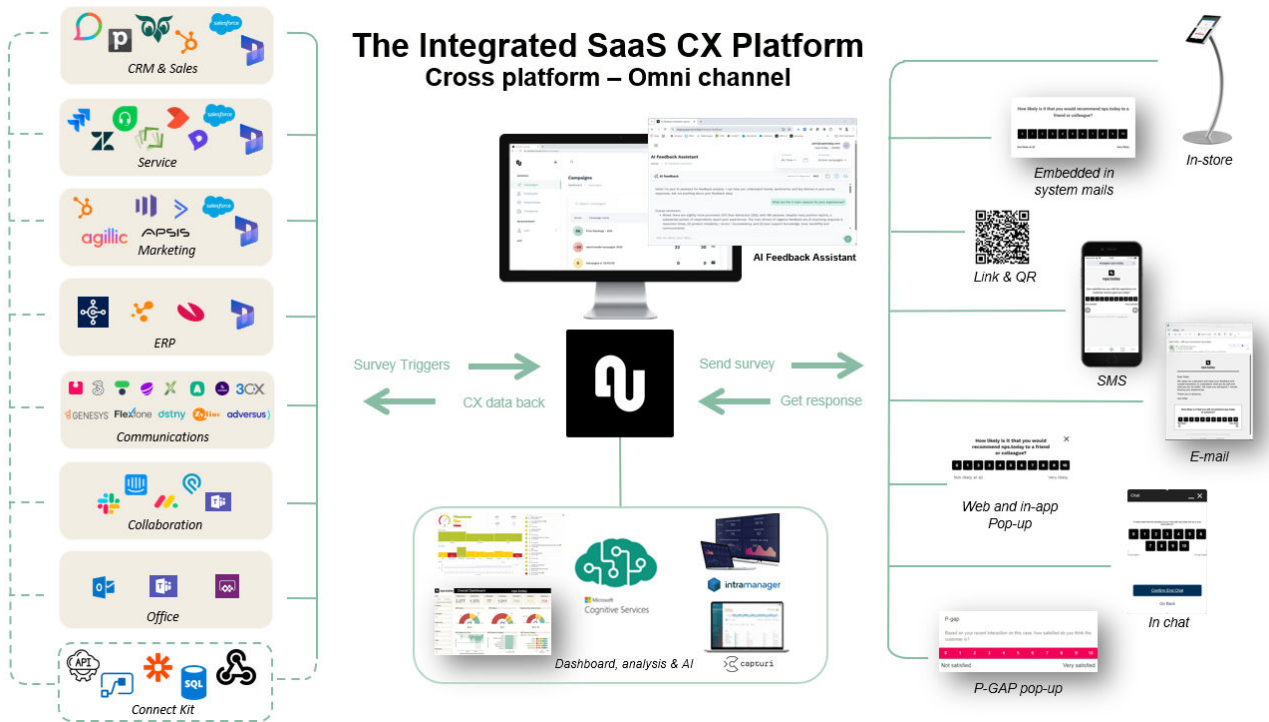
These AI-driven insights do not replace human decision-making but amplify the ability to react proactively and consistently.

## **Plug-in's and CX for CRM**

All customer feedback data should be available in your primary customer engagement or CRM system — just like any other data used to manage customers and relationships. This is a best practice requirement for any operational CX program: the teams who interact with customers must be able to see historic ratings, comments, pulse development and follow-up actions directly in the systems they use every day.

Many customer engagement systems include basic survey functionality, but these are typically limited in important ways. They may lack support for multiple channels, offer only simple survey types, or fail to provide the necessary context to understand reasons behind ratings. In many cases, the feedback collected in such modules becomes siloed — visible only within the specific system and without the broader view across touchpoints and channels.

To avoid this, nps.today offers integrations to the most common customer engagement platforms. These include both native plug-ins, prebuilt integrations and connectors. And where an off-the-shelf integration does not exist, the nps.today Connect Kit makes it significantly easier to establish a tailored integration, compared to building everything manually from scratch.

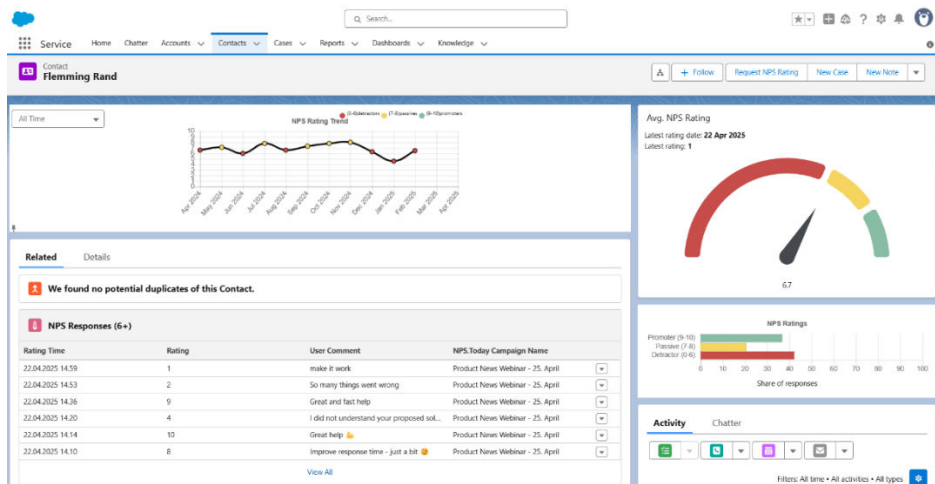


The nps.today fully native plug-in solutions are deeply embedded in the customer systems. These can include features such as:

- automated survey triggers
- feedback data returned into customer and account records
- calculated NPS values (e.g., Customer Pulse)
- CX/NPS graphs, dashboards, and reports
- automated alarms, warnings and follow-up assignments

Examples of systems with native integration support include Salesforce, Dynamics 365, Zendesk, Genesys, Puzzel and others.

When customer feedback becomes part of your CRM — instead of a separate tool — your employees do not need to switch or learn new systems to act on customer experience. This is the foundation for truly operational CX.



*NPS for Salesforce Contact screen example with Customer Pulse*

If response data is transferred into the customer system, it can be used to drive Customer Pulse calculations — including average ratings on both contacts and accounts, threshold-based warnings, suggested follow-up actions, and structured satisfaction or loyalty plans.

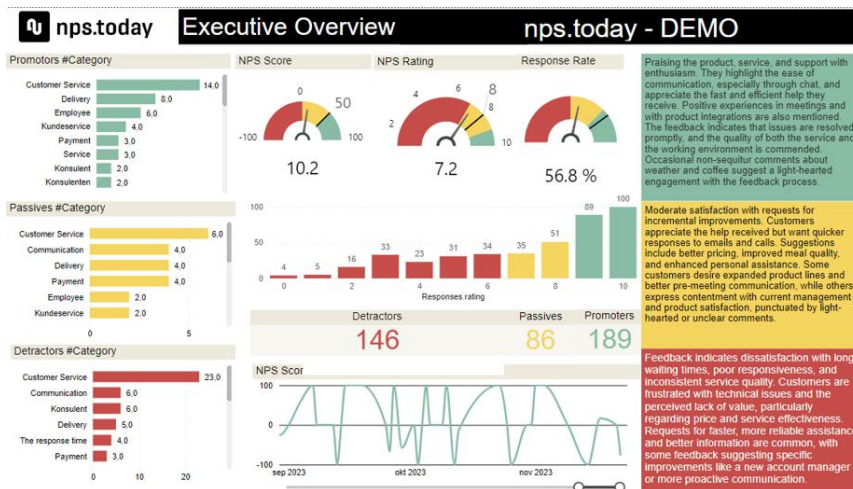
With customer feedback embedded directly in your CRM, employees do not need to adopt a new system or change their workflows. They can complete all follow-up activities inside the tools they already use every day, ensuring consistency, efficiency, and full visibility across the customer relationship.

## KPI's, Dashboarding, AI, Analytics and Reporting

High-quality reporting is essential for operational CX. The goal is not only to present data, but to make insights accessible and actionable for all relevant roles in the organization.

With the built-in nps.today Live Web Dashboards, you can display incoming responses and key NPS metrics in real time. Many organizations place these dashboards in contact centers, delivery departments, or sales teams to create awareness and support a customer-focused culture. Positive feedback becomes visible immediately, and detractors enter the “radar zone,” triggering discussion about underlying reasons and appropriate follow-up.





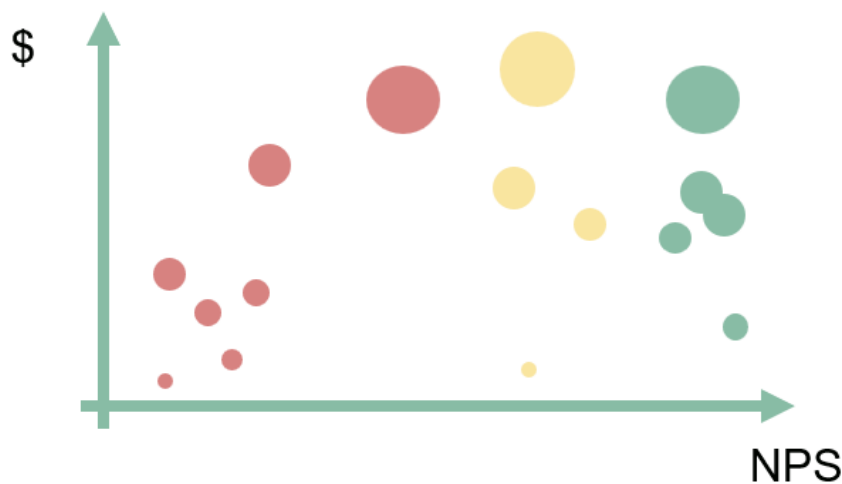
Power dashboards are delivered as a plug-and-play app for Power BI and require a Power BI license. It is easily connected to the nps.today platform with the API / Flow module.

### Connecting CX with broader business data

Power Dashboards allow you to combine customer feedback with other business data sources such as revenue, customer segmentation (e.g., ABC), product categories, or service levels. This helps identify where dissatisfaction carries the highest business risk — or where promoters represent valuable growth opportunities.

For example, a combined NPS/revenue graph can quickly reveal:

- high-value customers with low satisfaction (requiring immediate action)
- satisfied customers with strong potential for expansion
- groups of low-value customers with low NPS that may not be the right long-term fit



## Defining meaningful KPIs

Before launching rNPS and tNPS campaigns, you should define how CX results will be used and which KPIs to focus on. These may include:

- company-wide rNPS
- tNPS scores aggregated into journey-based metrics (e.g., salesNPS, deliveryNPS, serviceNPS)
- average ratings per department, region, team, or individual owner
- pulse development on customers
- follow-up compliance metrics
- recovery and resolution performance

Feedback reporting should scale from the individual response level all the way to the leadership team and board — ideally through dynamic dashboards rather than static PowerPoints. This supports a more data-driven, timely understanding of customer experience.

## Your Transformation Program

To gain long-term value from your CX program, customer feedback analysis and follow-up should be built into your operational rhythm. Many organizations establish:

- monthly feedback review meetings for relevant teams
- cross-functional sessions focused on trends, reasons, and prioritized actions
- strategic workshops to drive longer-term transformation initiatives

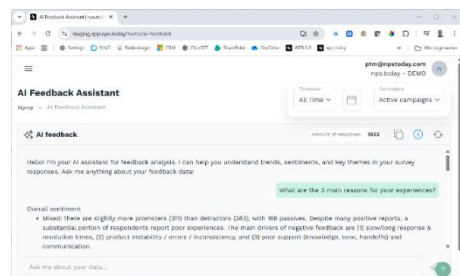
The aim is to ensure that insights translate into concrete improvements rather than becoming passive data points.

AI-enhanced summaries can support these sessions by consolidating the most important themes, suggesting likely root causes, and highlighting which actions may have the highest impact.

### AI Feedback Assistant

With the nps.today AI Feedback Assistant, you can now access instant summaries and insight-based analysis simply by asking questions about your customer feedback. Instead of manually drilling through datasets, you can prompt the assistant with questions such as:

- What is it about our product that customers appreciate the most?
- What are the three primary reasons behind poor customer experiences?
- Which two immediate actions would have the highest impact on satisfaction?



The AI Feedback Assistant helps you identify themes, understand root causes, and prepare for meetings or workshops with a clear, data-based overview. By turning complex response data into actionable insights, the assistant significantly accelerates

the feedback-to-action process and strengthens decision-making across your CX program.

## Implementation, Adoption, and Customer Success

With the nps.today Quick Win Implementation Model, organizations avoid the traditional long, costly project approach. Instead, the program is rolled out in practical, manageable steps — delivering value early while building toward full operational maturity.

If you do not yet have a baseline NPS survey, we recommend starting with a relational, one-off rNPS survey to all customers or to a representative segment. This helps establish an initial understanding of the customer experience, reveal immediate issues that require attention, and guide the design of your tNPS program.

Feedback from the baseline will indicate which touchpoints are most important to address first and which follow-up questions provide the strongest insights.

The implementation is typically carried out in close collaboration with an nps.today CX advisor and implementation specialists, who helps define the overall program design, configure the survey platform, support integration set-up, and prepare the first campaigns.

Once the first tNPS campaign is live and evaluated, the next step is determined — whether this is the automated rNPS program or a second tNPS touchpoint. This cycle continues, gradually expanding the program while learning and adjusting along the way.



With the nps.today Quick Win Implementation Model, you will not end up in a long and expensive project before you get a return on your CX investment.

## Your CX Program Success

To truly succeed and generate measurable value from your CX program — for both customers and your own organization — the program must be anchored strategically

and supported across the business. Customer experience cannot live in a silo. It must be an integrated part of your culture and your operational model.

Success requires a shared understanding of why the program is being launched, what outcomes you expect to achieve, and how feedback will be used across the customer journey. Clear communication, both internally and externally, is essential.

Based on years of experience, the most successful CX programs typically share these foundations:

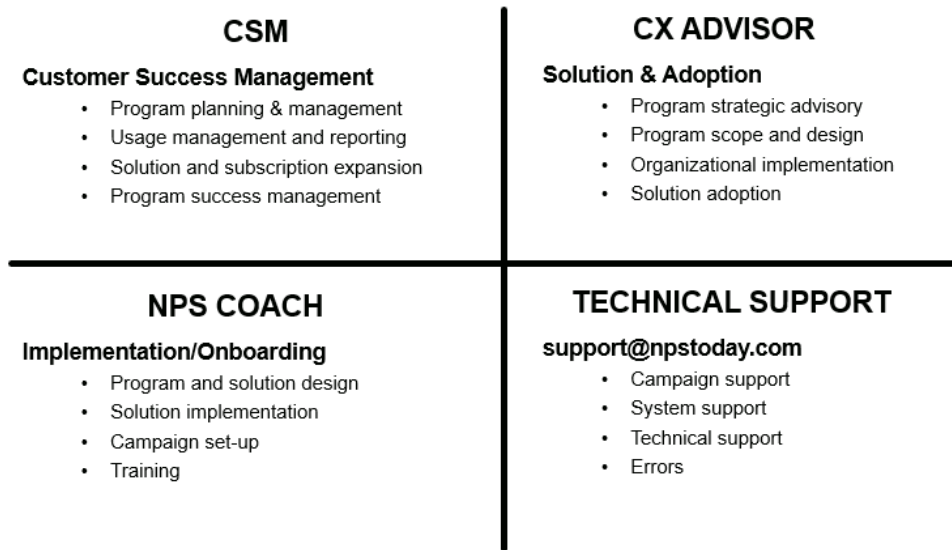
- **Strong executive sponsorship** — leadership must actively support and prioritize CX.
- **Clear ownership across the customer journey** — each business unit must understand and own its part of the closed loop: measure, understand, act.
- **Defined follow-up responsibilities** — everyone must know when and how to act on feedback.
- **Sufficient internal resources** — including a program owner, project manager, and customer-facing employees trained to follow up.
- **Aligned expectations** — employees must understand why feedback matters and how it benefits both customers and their own work.
- **Integrated systems and workflows** — feedback must be accessible inside the systems employees use every day.
- **Consistent communication** — insights, trends, and improvements should be shared regularly across teams.

Even though nps.today offers ready-to-use plug-ins and easy integrations, organizations still need to ensure that the right IT and system resources are available at key moments during implementation and expansion.

When these foundations are in place, your CX program naturally evolves from a measurement exercise into a continuous improvement engine — one that strengthens loyalty, improves performance across teams, and supports long-term business growth.

nps.today acts as your trusted partner throughout this journey. We support your program design, implementation, and ongoing development, and we take responsibility for helping you turn feedback into measurable value.

Here are the resources normally assigned from nps.today:



nps.today wish you good luck with your customer experience program and your journey towards a more customer-focused culture with a closed loop customer feedback set-up, making customer experience management an integrated part of your daily business.

**Turn on your customer experience radar - think big but start small.**