

Video 1: HubSpot's Feedback Framework

Happy customers are your best source of new business

If you're not convinced, think about your last purchase. Before buying, did you look at reviews or customer ratings? Most likely, you did. And you're not alone.

People read online reviews

90% of consumers read online reviews in order to make informed purchasing decisions.

Keep promoters happy

As a business, if you're not actively reaching out to your promoters or asking them to write reviews, you're missing out on a huge source of momentum for your flywheel.

How do you get happy customers?

If you want to be sure you're delighting your customers, you need to be in tune with them. And, in order to be in tune with them, you need to understand what they expect of you, as well as the current state of your customer experience. How do you do that? By collecting feedback — asking the right questions at the right time. Your questions need to generate actionable and easily digestible feedback that will allow you to make improvements to every step of your customer's journey.

HubSpot's Feedback Framework

If you've ever struggled with developing an effective customer feedback process, HubSpot is here to help. HubSpot's Feedback Framework is a customer feedback program that helps you establish listening posts, understand customer sentiment, and improve customer experience.

The first step in the feedback framework is to establish listening posts.

Listening posts are ways that you and your colleagues get honest and valuable feedback about various aspects of your company from your customer base. In this lesson, we'll talk about feedback surveys, a common and effective listening post for any business.

Three steps to establishing listening posts:

- Define your customer journey. What are you looking to learn at key milestones?
- Align survey methods and goals.
- Collect feedback.

Different types of surveys

There are three industry-standard surveys to help you collect valuable feedback. The Net Promoter Score helps you identify how likely a customer is to recommend your product or service to a friend. Similarly, Customer Satisfaction surveys allow customers share how happy they were with their experience. And Customer Effort Scores rate how easy it was to handle an issue with your product or service.

Custom feedback surveys

These industry standard surveys are great because they're microsurveys — short, simple, and easy for customers to complete. They also benchmark your data with others across similar industries, since, chances are, your competitors are using these surveys too. But, sometimes what you're hoping to learn isn't found in one of these generic surveys. If looking through your customer journey map, you realize the feedback you need can't be answered through an industry standard survey, consider writing your own.

Understanding customer sentiment

Once you've established listening posts, your next step is to understand customer sentiment.

Three steps to understanding customer sentiment

- Identify the root causes of customer feedback. When trying to get to the root, continue to ask yourself "why," until you're satisfied you've gotten to the root of the problem. For instance, let's say you got some pretty harsh feedback - "Worst product ever!" Do some digging to figure out why this customer is upset—look through their support tickets, talk to the folks who have dealt with them directly. Perhaps they were waiting on a technical question that your support team triaged to your engineering team, but your engineering team didn't see the question, so your customer never got their answer. In the end, the root cause for their feedback is that your company lacks a good system for cross-functional communication.
- Gather internal corollary data. Does the feedback match what people are saying internally?
- Categorize themes and patterns in feedback. The easiest way to do this is in a three-column table. In the first column, record customer feedback verbatim. Fill column two with the feedback theme; a general summary of the customer feedback. The third column is for the feedback type. In general, there are six types of feedback: functionality, feature request, usability, reliability, customer service, and pricing/billing. Depending on your industry, there may be others. By identifying feedback themes and types, you'll be able to categorize patterns of issues that impact the customer experience.

Improving the customer experience

Now that you understand customer sentiment, you want to improve the customer experience. Here are some key steps for this phase:

1. Prioritize high-impact changes. Analyzing the feedback themes and types, what's most important to your customers? You may want to map the feedback you received on a prioritization matrix. Low-cost, high-impact improvements should be made immediately. Improvements that are high-cost and high-impact should be considered next. Near-future improvements are those that are low-cost, low-impact, whereas high-cost, low-impact changes can wait for consideration in the distant future,
2. Form an internal task force that meets regularly to develop and implement an action plan around identified improvements.
3. Measure and share progress. Create a central dashboard where you and the members of your team can observe trends over time. If you use Slack or similar messaging software, create a channel where your whole organization can see feedback responses in real-time and take action. Transparency with feedback ensures accountability across your organization. Customer success is a team sport.
4. Individualized follow up. Once the improvements have been made, reach out to the customers who requested changes to share the good news. You're one step closer to turning your customers into your advocates.

Getting people to fill out your surveys

Sending out surveys is the easy part. The hard part is getting customers to fill out your surveys. Here are some strategies HubSpot uses to get customers to fill out feedback surveys.

- Offer incentives. Raffles, gift cards, an extra onboarding session, or free merchandise can all be used to increase survey response rates. Just be careful that you're not incentivizing people to give you good reviews; you're simply incentivizing them to complete the survey.
- Keep it short. Make sure you're valuing your customer's time.
- Be immediate. This way, you ensure the interaction is fresh in your customer's mind.
- Offer surveys via multiple channels. Be mindful of how and where you're reaching your customers — try to reach them where they are.

Collecting and analyzing feedback is no easy task

but by following HubSpot's Feedback Framework, you're working to delight customers into advocates, which in turn, fuels your company's growth.

Video 2: Net Promoter Score

If you're looking gain an understanding of how customers feel about your company as a whole, the best feedback survey to use is Net Promoter Score.

Net Promoter Score, or NPS, is a customer satisfaction benchmark that measures how likely your customers are to recommend your business to a colleague or friend.

NPS is a measure companies use to evaluate and improve customer loyalty.

NPS is different from other benchmarks, such as Customer Satisfaction Score or Customer Effort Score, in that it measures a customer's overall sentiment about a brand, versus their perception of a singular interaction or purchase.

NPS is an industry standard question. "On a scale of 0 to 10, how likely are you to recommend this brand to a friend or colleague?"

NPS responses can be categorized in three ways

- **Promoters:** Customers who respond with 9-10.
Promoters are enthusiastic, loyal customers who tell their friends about your business and bring in new customers.
- **Passives:** Customers who respond with 7-8.
Passives are indifferent. They got what they expected from your company and could become promoters, or they could switch to your competition; they generally don't feel strongly one way or another.
- **Detractors:** Customers who respond with 0-6.
Detractors are unhappy customers. Not only are you at risk of losing them, but they could also damage your brand by sharing their bad experiences with other people.

To calculate NPS, subtract the percentage of detractors from the percentage of promoters. The resulting number represents the likelihood your typical customer would recommend your business to a friend. For example, if you survey 100 people and 40% are detractors, 10% are passives, and 50% are promoters, your overall NPS would be 10, since we subtract 40 from 50. A "good" NPS depends on what industry you're in. For instance, average NPS for auto dealers is 39, whereas for internet service providers it's 0. Research your own industry and, once you have your first NPS, aim to improve upon that score.

Qualitative NPS feedback

Now that you understand collecting NPS ratings, let's talk about qualitative responses. Getting qualitative feedback through follow-up questions is a critical part of the NPS feedback process. These questions aim to dive deeper into the "why" behind a customer's initial NPS rating. When writing your follow-up questions, be sure they are customized, actionable and without bias, taking into consideration the initial NPS rating given by your customer.

For instance, if someone gives you a 4, you don't want to ask how you can continue to delight them.

A good follow up question for a detractor or a passive is: "What's one thing that we can do to improve your experience for next time?"

If your customer is a promoter, ask a question similar to: "How can we continue to provide you with the experience you've come to expect from us?"

These questions ask for specific information and will help you improve the customer experience.

Who to send NPS survey to

NPS surveys should be sent regularly, about once every quarter, or every 90 days. NPS surveys should only be sent to customers who have been with you for at least 30 days. You can ask for feedback from newer customers on other aspects,

such as the sales process, but, generally speaking, give your customers some time to become acquainted with your product or service before asking them their overall sentiment.

NPS survey medium

After you've created your NPS survey, the next step is to figure out how to distribute your survey. There are two main options: via email or website. If you generate a lot of traffic to your website, use your website. Just make sure it's not an intrusive experience; add it as a small pop-up in the corner. If you choose to distribute via email, make sure the email is optimized for mobile.

When to avoid requesting NPS

If your company is in the midst of a wide-spread issue, hold off sending your NPS survey until the situation is under control. If it's sent congruently, the short-term issue could skew your results.

Follow up

After customers have filled out your survey, thank them. They took the time to give you feedback; make sure they know it's appreciated and will be utilized. Just like with the qualitative questions, your follow-up message should be customized and relative to the score they give you. For your promoters and passives, say something like, "Your feedback means so much to us. Thank you for taking the time to help us improve." For detractors, something like, "We're sorry we let you down. We'll be in touch shortly to make things right." This way, you're holding yourself accountable to reach back out to this customer. But, negative reviews aren't the only ones you should follow up on. If a promoter gives you detailed, well thought out comments, connect with them. Ask if they'd be willing to write a review or case study — turn your customers into your best marketers!

Pro tip: Use NPS to survey overall employee satisfaction

NPS isn't just for your customers. Use NPS to measure internal employee satisfaction as well. Send out a survey every quarter asking your employees how likely they are to recommend their place of work to a friend.

When creating an NPS survey, keep in mind

1. NPS is an industry standard survey: it should read, "On a scale of 0 to 10, how likely are you to recommend this company to a friend?"
 2. Customers who respond to your NPS survey with a 9 or 10 are your promoters; 7 or 8 are your passives, and 0-6 are your detractors.
 3. Calculate NPS by subtracting your detractor percentage from your promoter percentage.
 4. NPS surveys can be delivered either via website or email.
- Establishing a listening post through your NPS survey is a great way to learn more about your customer sentiment.

Video 3: Customer Effort Score

If you're looking to understand how well your customer support team is doing, consider using Customer Effort Score. Customer Effort Score (CES) is a customer service metric that measures user experience with a service. Customers rank their experience on a seven-point scale ranging from "Very Difficult" to "Very Easy." This determines how much effort was required to use the service and how likely they are to continue to use or pay for it.

Customer Effort Score is useful for a few reasons. For starters, it's highly specific and actionable, as it pinpoints strengths and weaknesses in various interactions throughout your business.

Additionally, CES outperforms Customer Satisfaction and Net Promoter surveys at predicting future spending behavior. So, if your sales team is discussing future opportunities, reviewing CES would be a good place to start.

Similarly, CES is a strong predictor of referral likelihood, as 81% of customers reporting high customer effort say they would speak negatively about the company to others.

To get the best results, send out customer effort score surveys immediately after a ticket resolution, so the experience is fresh in your customer's mind.

Since this survey should be sent immediately after a customer support interaction, the best delivery method is email. Similar to the NPS process, allow your customer to provide both quantitative and qualitative feedback. After your customer gives their quantitative review, they have an option to give a qualitative review as well. Similar to the NPS survey, Customize the follow up question based on their reported score. For customers who give 6 or 7s and therefore think the process was quite easy, ask them how you can replicate their positive experience in the future. For buyers who gave you a score of 4 or 5, those who are either neutral or unhappy about their experience, ask them to share one thing you can improve for next time. For detractors, the ones who gave a score below 4, be sure to tell them you'll follow up with them promptly. When a customer's experience is less than ideal, it's important they know the company cares enough to make it right.

As you now know, Customer Effort Score is a great way to analyze and communicate where a team is struggling and where they're thriving. As a manager, using this data can be an effective tool to use during 1:1 meetings with your team members. Together, spend time reviewing customer effort scores. Look for overall trends — are there certain comments that appear more often? Everyone's bound to get a few low scores here and there, but what comments accompany those scores? Understanding both the quantitative and qualitative feedback will help you understand where employees need upskilling, and perhaps even which agents can help with that process.

In sum, Customer Effort Score is a useful way to measure the efficacy and ease of specific customer support interactions. CES can be used by your sales team to understand both cross-sell and up-sell opportunities, and it's a great way for support managers to understand what's going well and what needs improvement. in the support organization.

Video 4: Customer Satisfaction Survey

Customer satisfaction surveys, or CSTAT, help you understand the satisfaction levels of your customers at particular moments in time.

Wording for a CSTAT survey generally looks like "How happy were you with X experience?" followed by a three-point scale using smiley faces: happy, neutral, or sad. CSAT surveys are incredibly easy for customers to fill out. They don't need to spend time deciding which number to give, instead they have three distinct options. Unlike the generic wording of Customer Effort Score and Net Promoter Score surveys, CSAT questions directly address a specific experience or interaction.

CSTAT differs from NPS in that it measures satisfaction after a specific event, rather than measuring general sentiment. And, while both CSAT and Customer Effort Score are touchpoint surveys, meaning they measure a specific moment in time, CSTAT measures satisfaction whereas CES measures ease of application or use.

Like NPS and CES, Customer Satisfaction Surveys are most effective when sent immediately after a specific interaction. Say, once a customer completes onboarding, after a repair person visits your house, or after a specific marketing material is provided.

Depending on what you use your CSTAT survey for, delivery methods will differ. If the purpose of your CSAT is to understand post-purchase satisfaction, consider putting your CSTAT survey on a check out page. But, if you're assessing satisfaction following a home visit or something similar, your best bet is to send the survey out via email just after the visit is completed.

Just like with NPS and CES, CSTAT surveys need to offer a way for customers to leave qualitative feedback. Follow a similar pattern to NPS and CES surveys. For unhappy customers, ask what could be done differently, and tell them you'll be in touch to make things right. For neutral replies, simply ask what you can do to improve the experience for next time. And for happy customers, ask what made them give you that particular score. Make sure scores are documented somewhere, preferably in your CRM, so that when the time comes for testimonials or case studies, you know which customers to reach out to.

Video 5: Custom Feedback Surveys

As you look through your customer journey map to identify key moments to receive feedback, it's possible none of the industry standard surveys will help you get the information you need. While industry standard surveys are great for benchmarking your customer's experiences and comparing them across departments, sometimes you need to know more than their overall satisfaction or how easy it was to complete a task. You might want more information about your persona, why your customers chose you over a competitor, or how a specific new feature you launched is working.

That's where custom feedback surveys come in. With HubSpot's custom feedback surveys, you have the ability to build your own, targeted survey with a variety of customizable features including your ratings of choice, enumerated fields, multiple rating options, and many more. Custom feedback surveys can be shared via a link, email or website.

Let's take a look at some customized feedback surveys used by other companies. YouTube frequently asks their viewers to classify videos as relaxing, informative, novel, entertaining, etc. to help build out their algorithm. They wouldn't be able to get this information using an industry standard survey. In another example, a software company asks, "What problem are you trying to solve?" This question reveals more information about their persona. This company could take it one step further by asking the customer if they were able to solve said problem. And finally, for a company that just launched their website, they asked "What are your top reasons for visiting our website?" A question like this gives you information about a specific action taken by the customer.

Customized surveys are a great option when you're looking for specific feedback.

When writing survey questions, there are a few best practices to keep in mind.

1. Have a variety of open- and closed-ended questions. Close-ended questions, where respondents simply select their answer, are easier to answer, but might not get you all the information you need. It's okay to follow up with an open-ended question, but don't ask more than two open-ended questions per survey.
2. Remove bias in your questions. Questions that start with "How happy are you..." or "How good..." are leading questions that unintentionally cause customers to respond more positively than they might want to. Instead, word your questions something like, "How happy or unhappy are you with X experience?" Along the same lines, if you provide answer choices, make sure you provide a full range of choices — not just "Extremely helpful, Very helpful, and Helpful," but also "Neither helpful nor unhelpful, Unhelpful, and Not at all helpful."
3. Ask one question at a time. Asking, "Did you get your problem solved? If so, how was the experience?" all at once is too much. Split your questions into two different sections.
4. Keep questions optional. Survey Monkey found that requiring respondents to complete surveys actually makes them more likely to quit out of the survey or select an answer at random.

Custom feedback surveys are an excellent way to get specific feedback that can't be acquired through industry standard surveys. Keep your surveys clear, short, and unbiased and you're well on your way to improving the customer experience.

Video 6: Advocacy

As you start collecting feedback, it's just as important to reach out to your promoters as it is to reach out to your detractors. With your detractors, you try to make things right: reset expectations, answer outstanding questions, etc. With your promoters, you want to turn them into your advocates — the people who sing your praises and help you generate more business.

83% of consumers are willing to refer others to your product or service after a positive experience, yet only 29% do. This is largely because of one small misstep: no one asks for their help. In today's world, where people read reviews before making any purchase, it's critical to have happy customers in your corner. And to ensure this, you have to ask your promoters to become your advocates.

Four steps to creating an advocacy program

- Find potential advocates.
- Determine what to ask from potential advocates.
- Reach out.
- Market your advocates' work.

Collected feedback data should be stored in your customer relationship management system, or CRM. If you use Service Hub, your data will automatically be saved to HubSpot's CRM. Create a property in your CRM called "Possible advocates," and, as you collect and read through feedback, take note of the positive ones. If they have a high quantitative score as well as great comments, mark the "Possible advocate" property. This way, when it's time to reach out to customers you want to turn into advocates, you already have a running list.

The next step is to determine what to ask of potential advocates. Do some research on your promoters: do they have a lot of social media followers? Are they industry experts? Have they written blog posts in the past? This way, you can determine what to ask from them.

When reaching out to customers about their feedback, implement these useful advocacy actions:

- Customer reference calls
- Testimonials
- Online reviews
- Positive social mentions
- Feedback on new tools

In particular, leverage industry experts for:

- Case studies
- Blogs
- Positive social mentions

Once you've determined which actions you'll ask of certain promoters, the next step is to ask. Don't be shy here — 70% of customers will leave a review when asked, so if you're not asking, you're missing out on a great opportunity. To streamline the process, create email templates so you don't have to re-write every single ask. Simply add some personalization before you send out the template, and you're good to go.

Considerations when creating your email template:

- Timing. You want your promoter to take an advocacy action just after a positive experience.
- Write in a personal, casual tone. Even though you might be using a template, you're asking for a favor, so make sure it's not a boring, generic message. Better yet, if your customer connected well with someone from your company, have that employee reach out to the customer directly.
- Appeal to your customer's desire to help others. First and foremost: reviews help others make decisions. This can be a bigger selling point than simply helping out the company.
- Keep it short. The longer your email is, the less likely they are to read it. Just tell them what they need to know.
- Offer an incentive. An extra hour on-boarding, a free sweater, or a monetary gift card could help build out your advocacy program.

Since advocacy from your current customers is your best source of new customers, it's incredibly important to market their work. Advocate reviews should be shared wherever your customers are: G2Crowd, Facebook, Google, Yelp, etc. Tweets should be retweeted and blog posts or case studies should be leveraged appropriately by your customer facing teams, especially sales.

Turn your customers into your best marketers by asking them to advocate on your behalf. Advocates add momentum to your flywheel and fuel your company growth.

Video 7: Setting up Customer Feedback in HubSpot

To create customer feedback surveys in HubSpot, go to "Service" in the top navigation, and select "Feedback Surveys." From the "Getting started" menu, choose the type of survey you want to set up: Net Promoter Score, Customer Effort Score (support survey), or Customer Satisfaction. For this example, we'll create a Net Promoter Score, NPS, survey. On the top-right, click "Start."

Under "Delivery" decide your delivery method: either email or web page. If you choose web page, you'll need to choose where you want the survey positioned on your webpage.

When you're ready, click "Survey." Choose the survey language, your company name, and the NPS question. You'll notice that you aren't able to edit the NPS question, as this is industry standard. Choose the colors to match your brand. When you're ready, click "Feedback." Personalize your feedback based on if someone is a detractor, passive, or promoter. Click into "Thank you." Similarly, personalize your thank you image and message based on if your reviewer is a detractor, passive, or promoter. Next, click into "Audience." Choose who you want to survey. You can choose based on the following criteria: Became a customer date; Start from scratch (here you can set your own criteria); or your marketing static lists.

When you're ready, click "Settings" and choose how often your survey will be sent out. For NPS, we recommend every 3 months, but you can edit this to your liking. Your survey will then be sent out automatically, based on the criteria chosen. If you choose to send your survey out via website, identify which pages you'd like it to show up on, after how many seconds, and if you want it to be compatible with mobile.

Next, identify who you want to notify about new survey responses.

Under "Automation," you can create workflows based on survey responses. For example, if a score of 0-6 is reported, the contact owner can be notified that a workflow has been generated.

To finalize your survey, click "Review and Publish." Once you start receiving feedback, you'll be able to see results on the dashboard under "Responses." If you want to see even more statistics, click "Analyze."

You now know how to set up a customer feedback survey in HubSpot.