bosbec®

NPS

Bosbec Services
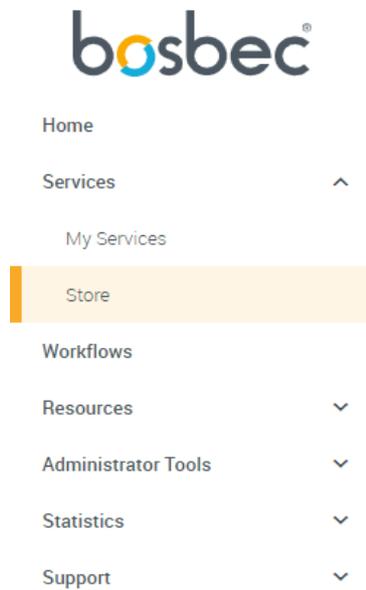
English

Table of Contents

Preparations

To help you get started with the "NPS" service, this document will not only show you how to use it but also how to install and configure it.
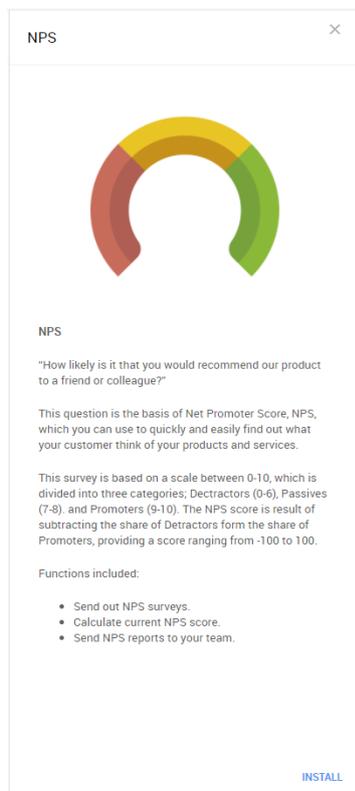
Installation

Image 1: Navigation Menu

All Bosbec Services, including the services in the retail package, can be installed from the **Service Store**.

You will find the Service Store in the main navigation menu to the left.

Image 2: The installation page for "Registration via QR"

Find the "NPS" icon and click it to open the **installation page**.

The installation page contains some information about the features of the service and an install button in the bottom right. Click the install button.

This will bring up an installation prompt where you simply click "*INSTALL*".

Configuration

You now have your service and related resources installed and you are ready to configure it!

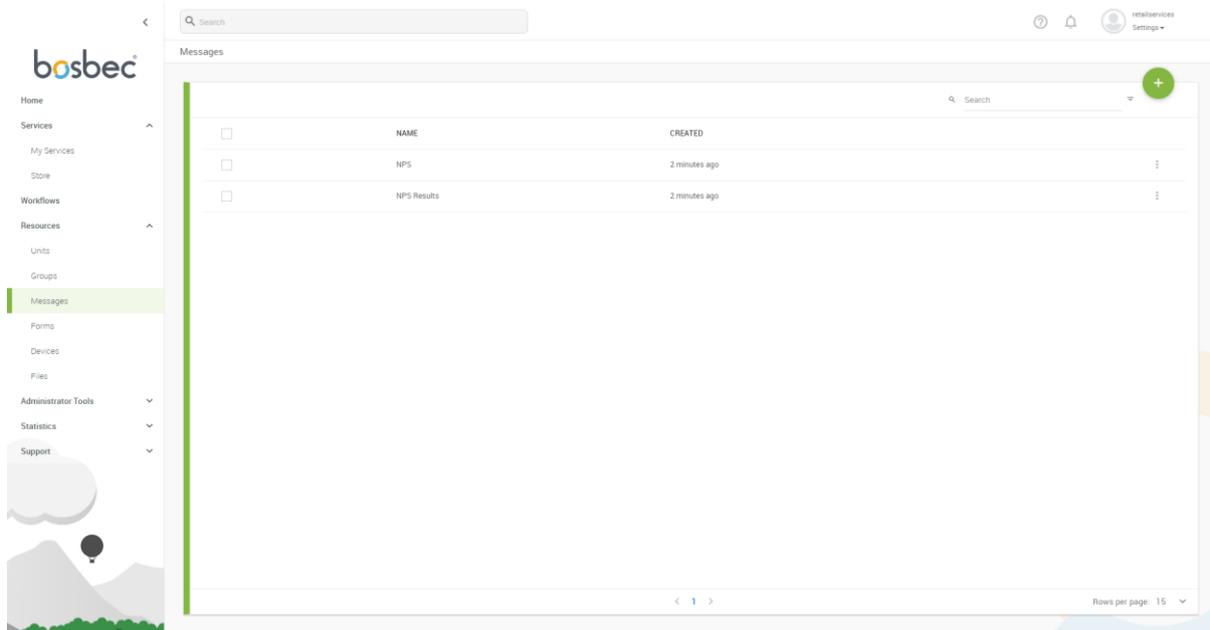Start by going to **Messages** in the main navigation menu.

Image 3: The Messages page

Image 4: "Edit message" drawer

On the Messages page, you will find three new message templates. Click on the first one to bring up its settings.

This is where you can change the message text to whatever suits your business! Simply change the text in the **Message Body** field.

Note that it is important that the text in brackets is left in the message template, but you are free to move it to a place where it makes the most sense in your custom text. The text *[form]* will be replaced by a code generated for the recipient of the message, and it is important to keep these tags next to each other in that order.

With the message template configured, let us head over to the **My Services** page using the main navigation menu.
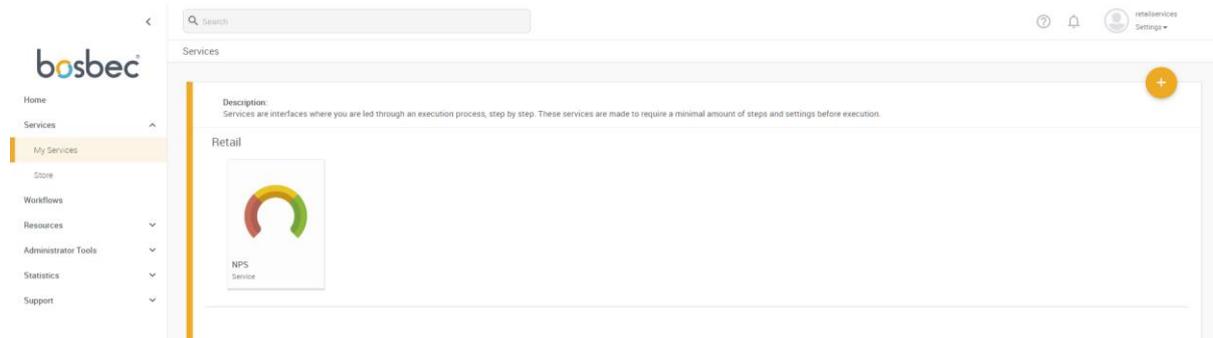

Image 5: My services

This is where you will find all your installed services. Click on **NPS**.
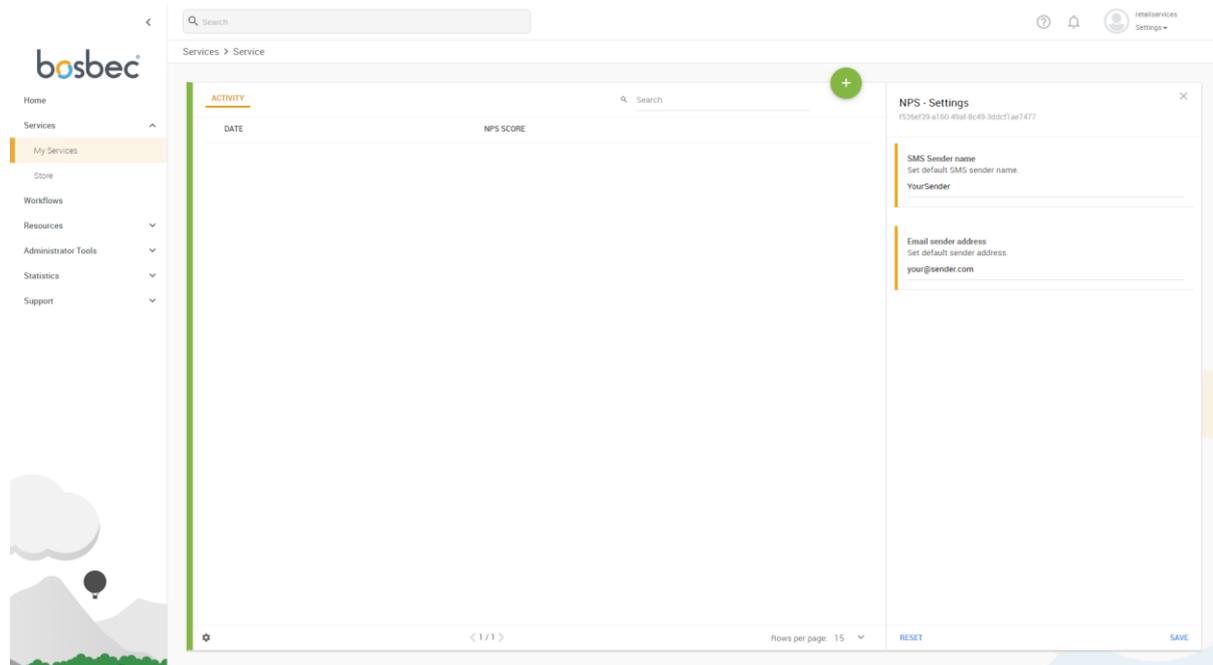
Image 6: The service view with the settings panel opened

This is the service view and from where you will manage your vouchers. However, there is still one setting that needs to be configured, SMS Sender name.

Click on the **cogwheel** in the bottom left corner.

This brings up the settings drawer from where you can change the SMS sender name. Note that SMS sender names can contain a maximum of 11 characters (A-Z, a-z and 0-9).

Click on "Save" at the bottom right corner.

You are now ready to start using the service!

How to use

This section provides you with instructions of how to use the service "NPS".

Add recipients to your NPS groups

To send out NPS surveys and summaries of your NPS scores, you need to specify the recipients. To add recipients to your groups, expand the "Resources" folder in the left navigation bar and click on "Groups". This will open a dashboard listing all your available groups, and with the NPS service, you will have at least four groups.

Groups:
1. "NPS": The group which will receive the NPS surveys, these group members could be your customers.
2. "NPS Results": The group to send the NPS results to, these group members could contain managers or administrators.
3. "NPS – Detractors": Submitting a score below 7 will categorize a customer as a Detractor, these are customers with lower satisfaction and could impede business. You can use this list/group to offer deals, compensations, or newsletters.
4. "NPS - Promoters": Submitting a score above 8 will categorize a customer as a Promoter, these are customers with high satisfaction, loyal and enthusiastic customers helping your business grow. You can use this list/group to offer deals, compensations, or newsletters.

To add recipients to the group "NPS", the one that will receive surveys, click on the group and choose "Add New Unit". You can add already existing units, single new units, or multiple (by copying from a CSV file or an Excel sheet).
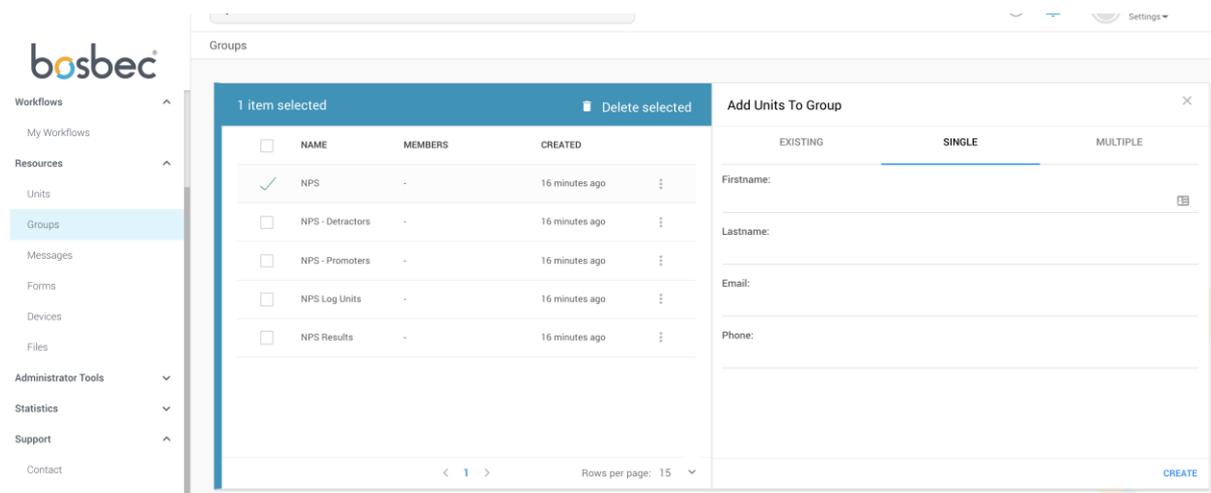

Image 3: Add either existing units, new single units or multiple units in the navigation bar to your right.

Perform the same operations to add units to your "NPS Results" group, the two remaining groups, Detractors and Promoters, will be updated automatically.

Send out surveys

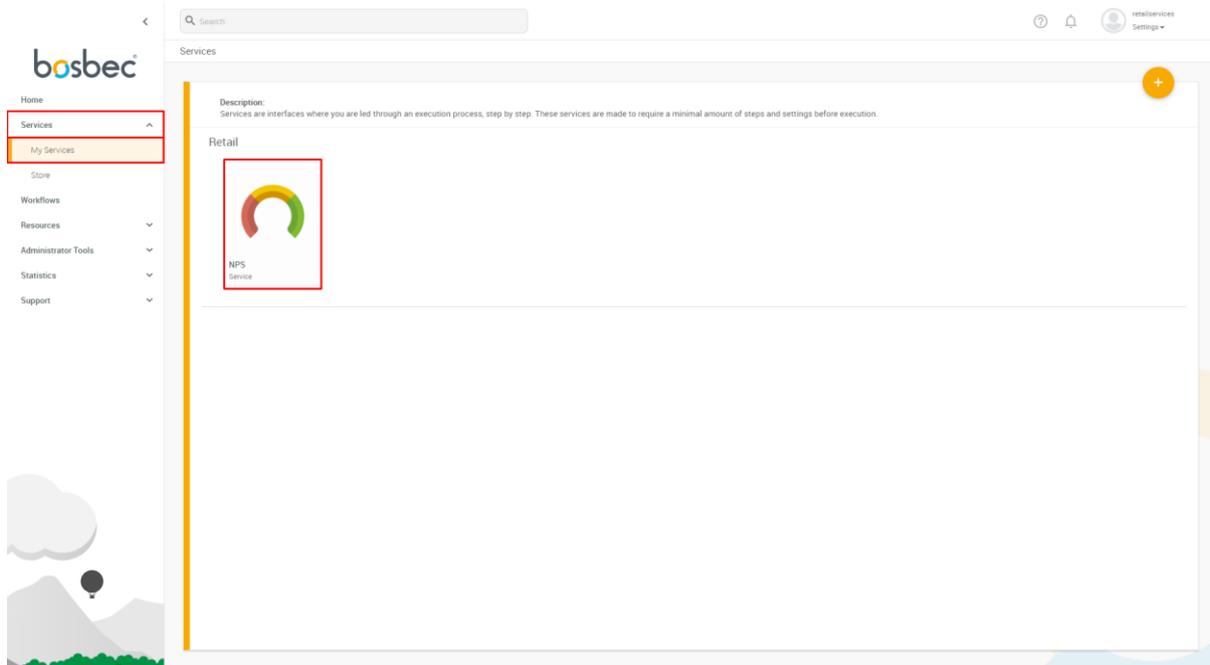Go to "My Services" and click on your newly installed service "NPS".

Image 4: Expand "Services" and click on "My Services". Select the service "NPS".

Once inside the service, click on the green plus icon in the top right corner to expand the navigation bar. This navigation bar contains all actions available for the NPS survey, select the first action named "Send out surveys".
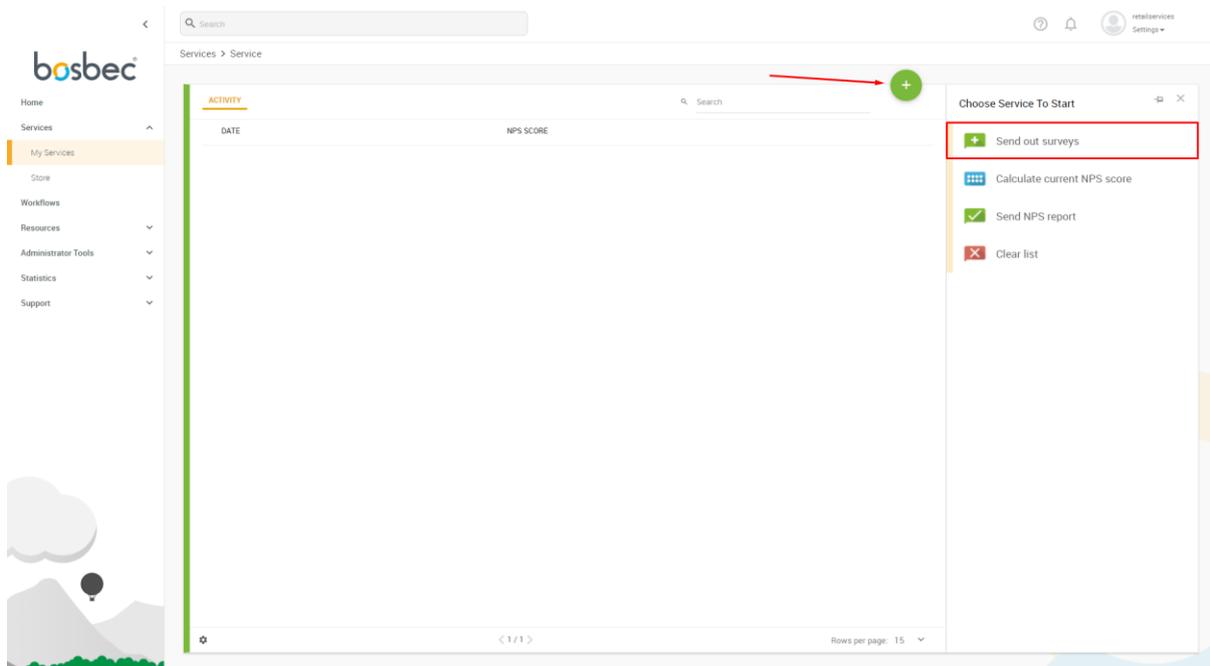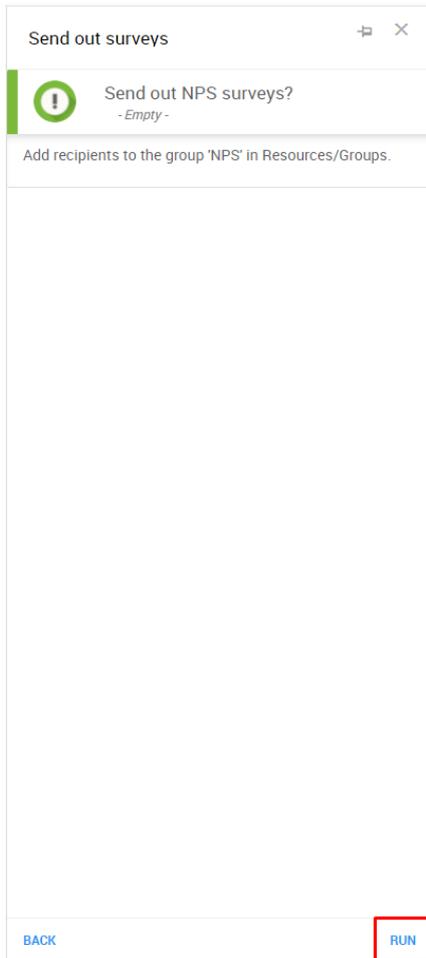

Image 5: Create a QR code by clicking the plus icon in the top right corner, select "Create code".

Send out your NPS survey by clicking the action button "RUN" in the bottom right corner. The navigation bar also reminds you to add recipients to the group "NPS", if you missed the previous step.

Image 6: Send out surveys by clicking "RUN" in the bottom right corner.

Calculate current NPS score

Assuming that at least one customer has submitted an NPS survey, you can calculate the NPS result score. The NPS result is calculated by subtracting the share of Detractors (score 0-6) from the share of Promoters (9-10), providing a score ranging from -100 to 100.

Again, click on the green plus icon in the top right corner to open the action navigation bar. Click on "Calculate current NPS score" and the action button "RUN" in the bottom right corner.

Calculating the score will update the service dashboard, adding a new item to the list, containing a timestamp and the NPS score of that date.

The same operation is performed by clicking the third option, "Send NPS report", but in this case, an email is sent to all group members in the group "NPS Results" with the current NPS score and date.

The fourth and final option, "Clear list", will remove all logs in the service dashboard. This action cannot be undone.

Further reading

This service was built using the Bosbec Workflow Builder and is run using the Workflow Engine. If you want to learn more about these concepts, read more at https://help.bosbec.io/.