

- Situation**
- Info-Pro a provider of tax software wanted to better understand customer needs and trends
- Objectives**
- Get a Baseline NPS (Net Promoter Score)
 - Understand the factors that impact Trust
 - Understand the factors that impact Loyalty
 - Determine which initiatives should receive additional funds
 - Identify any initiatives which don't provide a perceived benefit to current and prospective customers
- Approach**
- Identify factors to survey
 - Develop survey
 - Create video and email messages to elicit response
 - Conduct analysis
 - Develop dashboard to gauge and track progress
 - Create organizational KPIs (Key Performance Indicators) as well as additional metrics to gauge success
 - Incentivise improvements
- Results**
- NPS baseline was established and subsequent surveys showed continuous improvement
 - Valued programs and actions received additional funding
 - A handful of initiatives were redirected based upon feedback
 - More frequent touch points for customers were scheduled
 - Research findings gave additional insights into both new customer acquisition as well as what are the IDPs (Ideal Customer Profiles)