

# Annual vs. Ongoing

## Moving your relationship survey to real-time feedback

Presented by:

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Ryen Salo, Sr. Account Manager



# A quick introduction



Est. 2003

Focus on B2B service providers since 2007

We believe it's good business to place client satisfaction at the heart of your growth strategy.



Lauren Petersen, Sr. Account Manager  
6 years with Inavero  
2018 NPS: 93% (from 72 client comments)



Ryen Salo, Sr. Account Manager  
4 years with Inavero  
2018 NPS: 90% (from 58 client comments)

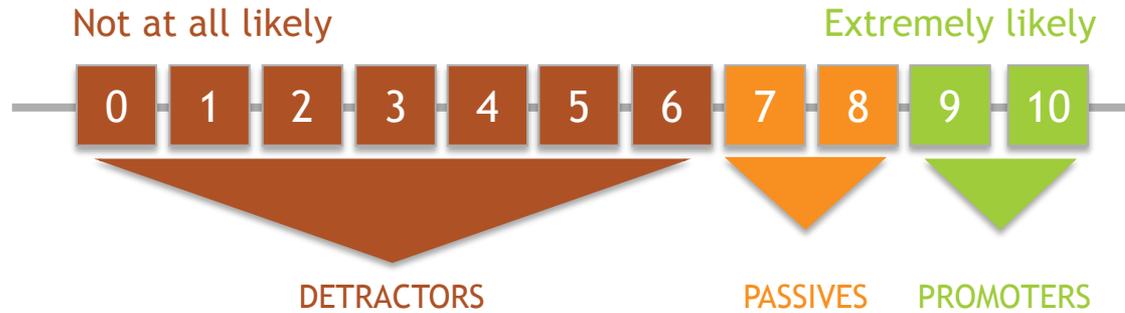
# What you'll leave with today...

1. Print to Twitter- Why real time matters
2. Benefits of an ongoing feedback program
3. Common concerns about surveying in real-time (and why it isn't as scary as it sounds, we promise!)
4. Full disclosure: A shameless plug for Inavero's Talent Engagement

But first- Quick  
review

# Net Promoter® Score (NPS)

How likely are you to recommend our firm to a friend or colleague?



$$\text{Net Promoter® Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

# Why NPS?

- Directly **linked to** growth strategy - **referrals**.
- Single metric to **benchmark** against the industry and across other world-class service organizations.
- Creates service **awareness** and makes service quality an **accessible** goal across the organization.
- Measures **loyalty behavior as a proxy for client perception** - helps clients remove their own bias about what constitutes “good” or “great” service.





How are we doing?



How did we do on [XYZ]?

Capitalize on  
critical moments.

Talent  
Engagement  
Strategy



Talent  
Engagement  
Execution





## Benefits of an ongoing feedback program

1. You're **proactive** about addressing your audience's needs.

# Don't leave them on a raft

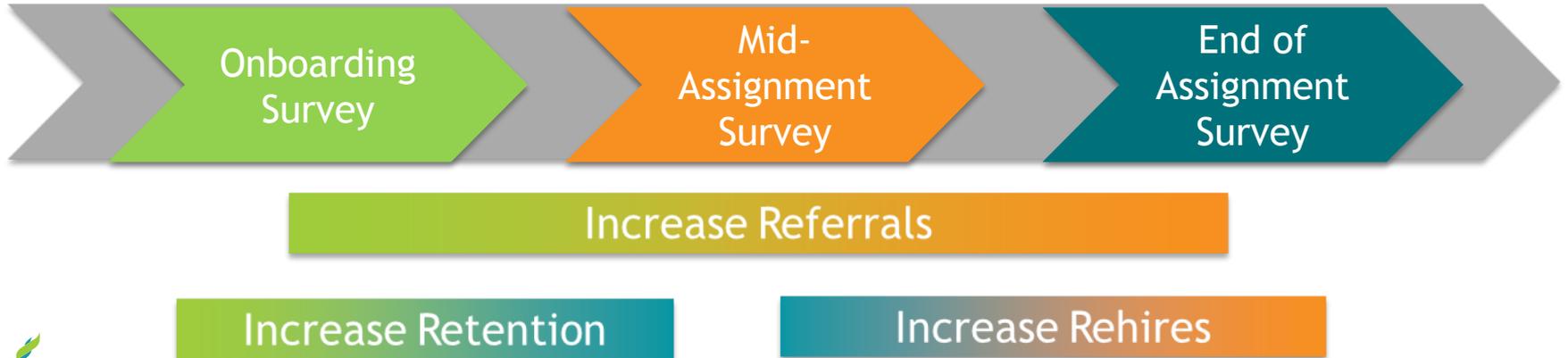


2. Gain **visibility** and **accountability** into your process.

Talent  
Engagement  
Strategy



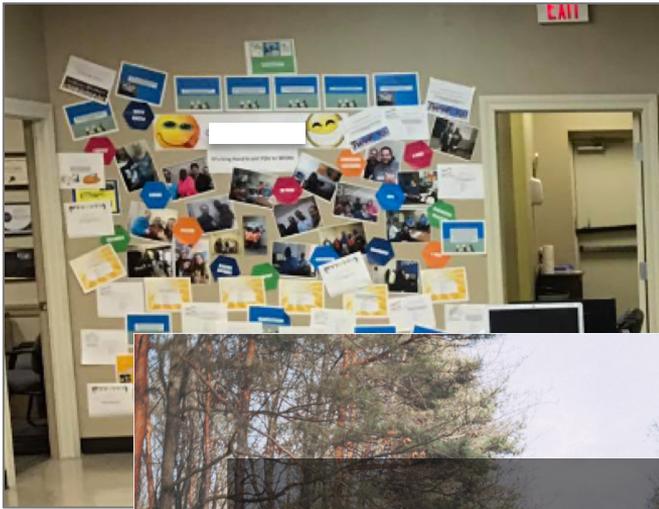
Talent  
Engagement  
Execution



3. NPS and regular feedback  
become part of your  
culture.

# Make your testimonials matter





Ryen Salo  
Account Manager  
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Shout Outs from  
Clients in 2018  
90.2% NPS

Here's what clients say about working with Ryen:

*"I have sent Ryen so many questions over the course of this process, and she answered every single one thoroughly, patiently, and quickly. I know she has a lot to do and many people to assist, but I always felt like I was the most important client she had and that she was just waiting to help with whatever I needed." - Client, March 2018*

*"Ryen is a rockstar! Ryen has excellent responsiveness, is so positive in all her communication and continuously looks for ways that Inavero can be the best partner to us. We really enjoy working with her!" - Client, February 2018*

*"She always provides any assistance I require immediately and with a smile I can feel, even if I cannot see her face." - Client, February 2018*

*"Her level of service is so impressive and something I try to mimic with my partnerships. She is always helpful, timely and fun! Keep up the great work gal!" - Client, February 2018*

*"Ryen is ALWAYS going above and beyond for everyone at our company. I feel like we must be such a high maintenance customer, but I also never get the sense that we are to her. She makes us feel like we're her best customer and for that, I'm very grateful!" - Client, January 2018*

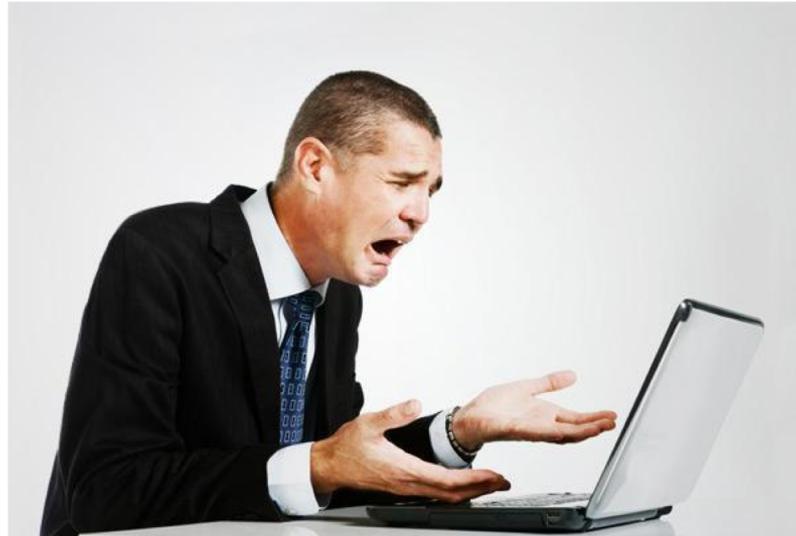
**Fun Fact:**

Ryen moonlights as a wedding and event coordinator when not at Inavero. She also loves brunch, and has a detailed spreadsheet of her favorite spots in Portland.

# Common Concerns

And some helpful words!

Concern: “Pulling a contact list MORE than once a year?!”



# Create a workflow that works

Communicate initiatives internally & what data you will need/how often

Make survey responses and metrics part of ongoing internal communication

Bonus: End up with a cleaner ATS/CRM!

Tell your audience when you will be asking for feedback

Share results often- internally & externally

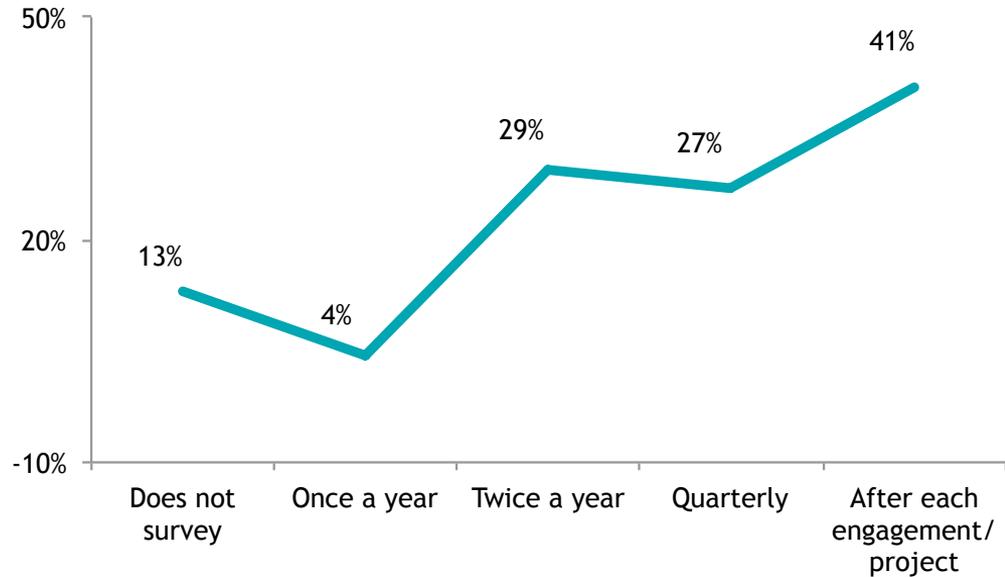
Concern: “I don’t want to over-survey my contacts.”



# How to avoid survey fatigue

- Pinpoint the right time to ask for feedback
- Communicate your process
- Show them how you use customer feedback
- Use technology to build in suppression rules

Relationship between Survey Consistency and NPS





Concern: “I don’t have the resources to implement this program.”

# You can't do it solo



- Adoption from different teams & Sr. Leadership
- If you're asking for feedback consistently, you have to use it

# You ~~can't~~ don't have to do it solo



- Provide resources throughout process
- Help to prevent survey fatigue
- Provide trainings to you and your team
- We are really fun to hang out with!

# QUESTIONS?



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