

## What is Net Promoter Score (NPS)?

NPS is a metric designed to ask the golden question, “*Would You Recommend This Service To Someone Else?*” It is **THE** gauge for how retailers grade the customer’s overall buying experience and whether they will return AND recommend others to shop there.

NPS is measured either on a 0-10 scale or on 1-10 scale via customer survey. People who respond to the survey are then grouped into one of three categories:

	0 – 10 Scale	1 – 10 Scale
<b>Promoter</b>	9 & 10	9 & 10
<b>Neutral</b>	7 & 8	7 & 8
<b>Detractor</b>	0 – 6	1 – 6

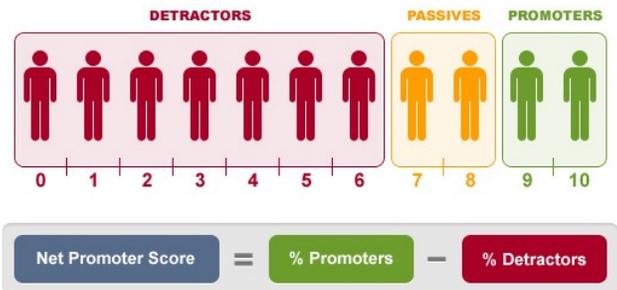
NPS measures customer **LOYALTY**. Customer loyalty is based largely on the customer’s perception of their experiences, including:

- How customers feel (*emotional connection*) about their experiences with the retailer.
- What customers actually get (*products and services*) from their experiences with the retailer.
- The value customers believe they get (*return on their investment*) from the products and services they purchase, and from their relationship with the retailer.

## How is Net Promoter Score is Calculated?

Upon completion of each job, the customer receives a survey, asking them to rate their service experience.

- Tally the total number of surveys received.
  - Example: 150 surveys sent out, 100 received back. 100 is used as the denominator.
- Tally the number of Promoters who gave survey ratings of “9” or “10.”
  - Example: Of the 100 surveys received, 75 are Promoters.
- Tally the number of Detractors who gave survey ratings of “0” through “6.”
  - Example: Of the 100 surveys received, 15 are Detractors.
- Neutrals or Passives ratings of “7” or “8” are not used to calculate NPS.
- Divide the number of Promoter Surveys received by the Total surveys received to find Promoter Percentage.
  - Example: 75/100 = 75% Promoter
- Divide the number of Detractor Surveys received by the Total surveys received to find Detractor Percentage.
  - Example: 15/100 = 15% Detractor
- Subtract the Detractor Percentage from the Promoter Percentage to get Net Promoter Score.
  - Example: 75% Promoter minus 15% Detractor; NPS = 60%



## Lowe's Survey

Lowe's, like Best Buy, send their own survey to the customer. Shortly after the installation is complete, the customer will receive a phone call or email asking them about their service. The questions on this survey are different than the NPS questions. The three questions that matter to our servicers are:

- Likelihood to Recommend Lowe's Services Would you recommend us to others for the service(s) we have provided to you in-home today? This question is a 0-to-10-point scale--- a 10 rating is the best that we can do. If we have not earned a 10, let us know so we can fix that.
- Rate our Craftsmanship This is about the onsite skills exhibited, installation process, and final overall look of your project. This is a 0-to-7-point question, with 7(Completely Satisfied) being the best that we can do.
- Rate our Professionalism This is about our performance with overall communication, attitude, and respect we have shown to you and your home today. This is a 0-to-7-point question, with 7(Completely Satisfied) being the best that we can do.

## Why is NPS Important?

Research has shown that a Promoter, on average, generally tells TWO (2) other people they know about their positive buying experience. However, a Detractor, on average, will tell NINE (9) people about their negative buying experience. Think about this notion on a larger scale: Let's say we had 100 customers with 50 Promoters and 50 Detractors. On average, the Promoters will tell 100 people about their great experience while the Detractors will tell 450 how bad it was!!! The Voice of the Customer is all-powerful; we need to respect it and embrace it.

Some recent research shows that customers prioritize three major aspects of a service event and THE most important factors are:

- The installation team is knowledgeable about the services that they are providing
- The installation team treats my home with courtesy and respect
- The installation team treats me, the customer, with courtesy and respect

## What can I Do to Improve NPS?

As ambassadors of our clients' brands, products, and services, it is important that we positively reinforce the customer's loyalty whenever we speak with them on the phone or work with them in person. Below are some simple things we can all do to encourage customers' continued loyalty to our clients and their brands.

### **BE PROACTIVE – Prepare for Every Job Ahead of Time**

- Read the SOW the night before each job to understand pick-up/delivery requirements and to familiarize yourself with the equipment and services included. This can help eliminate surprises, help you show the customer you are ready and able, and it can save you time onsite.
- Make sure you have the right size crew and the right tools/parts for each job.
- Communicate: Once onsite, explain the SOW to the customer **BEFORE** you begin so they understand what you will be doing.

### **BE PROFESSIONAL – Inspire Customer Confidence and Trust**

- Ensure your vehicle and dress comply with client requirements.
- Be on time. If you are late or you are going to miss a job, call Home Solutions (1-888-490-4321) before the end of the appointment window.
- Perform every job to the highest quality standards. Let your work demonstrate the fact that you are a skilled, experienced servicer.
- Don't rush; give the customer the time they need in order to be satisfied with the service.
- Communicate: **ALWAYS** provide the customer a demonstration/training of their new equipment.

## **BE POSITIVE – Set and Maintain the Tone of Each Job with a Good Attitude**

- Never speak negatively about the client or the products/brands the customer has purchased. Remember, the customer's relationship is with the client, and you are a representative of that client in the customer's eyes.
- If something goes wrong on the job, exercise empathy and your best customer service and communication skills.
- Communicate: Keep the customer informed along the way. If a service cannot be completed due to extenuating circumstances (e.g., TV cannot connect to internet due to Internet Service Provider [ISP]; TV not working due to old cable box, etc.), notify the customer of the issue in a professional way – don't just blame another party for the problem. If you can, take a couple extra steps to try to help the customer (e.g., call the ISP or cable company), and always report the problem to Home Solutions (1-888-490-4321) from onsite.

Letting customers know that the survey is coming is a necessary step to improving NPS response rates. NPS survey responses are vital to understanding and improving the customer experience. **It is important that we get as many NPS survey responses as possible on our jobs.** At the end of each Home Solutions job, every servicer must:

- Ask the customer if you have done everything they expected you to do today. Follow up on any loose ends. **DO NOT** ask the customer to give you a promoter score.
- Notify each customer that they will be sent a survey: "You will receive a email survey inviting you to provide comments or suggestions regarding our service today."
- Encourage each customer to complete the survey: "Your feedback is important to me, and I would appreciate it if you could take a moment to complete the survey when you receive it."

NPS is our moral compass, our "True North." We are laser-focused on helping our clients achieve the highest possible NPS. We will, without any doubt, lead the in-home service industry in NPS. In order to achieve this goal, we need you. Adopt this standard, embrace it. Embrace its importance to your own business. It costs nothing but is invaluable to your business. And it is entirely free marketing for your business as you cultivate your own sales beyond the work Home Solutions provides to you.



## **Coaching for NPS**

When addressing low NPS scores with a servicer, we want to avoid being accusatory or placing blames. We should focus on steps that can be taken to improve take rate and score.

1. Ask the servicer if they discussed the NPS survey with the customer.
2. Review the servicer's normal process and offer tips to improve customer satisfaction (see *Coaching Suggestions* section of this document).
  - If you know a servicer is having a lot of a certain type of escalation, such as Missed Appointment, tune your coaching to address that issue.
  - Use specific job examples to provide objective and actionable coaching.
3. Follow up on the coaching on a later date. Congratulate those that improve their scores and continue to work with those that are not improving.
4. Document all coaching in the appropriate systems – SMT, SharePoint, etc.

## **Coaching Suggestions**

When working with service companies about their NPS scores, there are some common issues that we see. Below are some suggested coaching prompts to help address these common concerns.

## ***Reviewing Jobs in DOLI for Coaching***

Read through the Order History looking for the following information:

- Were there reschedules or job rejections?
- Did the servicer miss any appointments by being late, early, no call/no show?
- Were there any onsite issues? If so, did the servicer report them per the client process?
- Is there any mention of customer complaints?
- Did the service make all breadcrumb updates in the Mobile App (Start Route, Equipment Pickup, Precall, Onsite, Complete)
- Did the servicer report all sales to Home Solutions prior to performing the work?
- Are there any escalations on this order?
- Is there an NPS survey returned for this job? If so, what is the customer's feedback?

Identify the major areas for improvement to discuss with the servicer and coach per the above process.

## ***Missed Appointments***

- Proactively review your scheduled jobs prior to the day of the appointment. If there are any conflicts or if you are overbooked, contact Home Solutions immediately.
- If for any reason you will be late to an appointment, the customer immediately and notate the situation in the Mobile App. You may also chat/call Home Solutions to have the customer contacted.
  - If several customers will be impacted, be sure to update each customer and keep them informed of any changes. If reaching out to Home Solutions, mention all affected job to ensure all customers are contacted.
  - If you need to reschedule any customer(s), chat/call Home Solutions to have the customer contacted.
- Call the customer when you are on your way to their home. Home Solutions' expectation is that you call the customer roughly 30 minutes prior to arrival.
- Being late without any contact to the customer shows a lack of respect for the customer.
- Do not make excuses or place blame on the client, Home Solutions, or other customers when informing the customer of a late arrival. Instead, focus on a solution and providing an excellent service.
- By ignoring the inconvenience caused by a missed appointment, we show a disregard for the customer's other responsibilities.
  - When customers schedule a service, they set aside considerable time, often taking time from work or family commitments.
- To prevent missed appointments and reduce the number of detractors they cause, you should be proactive about resolving any scheduling conflicts and always inform Home Solutions immediately if you are going to miss the scheduled arrival window.
  - Check your Dispatch Board and non-Home Solutions job calendar before accepting new work.
  - Update your Capacity often.

## ***Onsite Issues***

Onsite issues can be any situation that might prevent the service from being completed as scheduled.

Examples include, but are not limited to, customer not home for appointment, products that are damaged or defective, missing parts, or the customer's home not being ready for the installation.

- When you discover an onsite issue, explain, and where possible, show the issue to the customer.
- When explaining the issue, be professional. Never blame the client, CRST Home SOLUTIONS, or the product.
- Show empathy. Onsite issues often mean the customer will need to reschedule the installation for later date, often cancelling plans or taking time off work.
- As soon as you understand the situation will prevent the service from being completed as scheduled, you need to chat/call Home Solutions from onsite.
  - Allows us to follow client specific processes for updating orders in DOLI
  - Allows Home Solutions to immediately start resolving the problem for the customer by contacting the client, customer, updating the job, etc.
- Providing details directly to Home Solutions means that we are best able to understand what needs to happen next.
- Not reporting issues delays the customer's resolution, showing the customer that we inefficient and do not recognize the inconvenience that onsite issues cause the customer.
- Failure to report issue to Home Solutions also gives the impression that servicers, Home Solutions, and the client do not communicate well. This will make the customer see us as unprofessional and the customer will be hesitant to work with us in the future.

## Upsells/Additional Work

- Home Solutions nor the servicer can take direct payment from any **Lowe's** customer for any service or product. Servicers must call from onsite to have additional charges approved and covered by Lowe's.
- For **Mirror** orders, the customer may change their installation type (delivery only, on-stand, or on-wall) at any time. The servicer should confirm the customer's preferences and perform the requested installation type. If the SKU needs to be updated, the servicer should complete the work, upload a photo of the completed work, and then chat/call Home Solutions to have the SKU updated.
- Anytime the customer is expecting work beyond the scope of the purchased services or when you discover additional work will need to be done for the purchased services to be successfully completed, you will need to call Home Solutions **BEFORE** you perform the extra work.
- Home Solutions will walk you through the client-specific process for this situation.
- Generally, servicers can sell parts and labor that we do not have a SKU offering for to the customer directly. Anything we have a SKU for, must be processed through Home Solutions and/or the client.
- There are processes in place for when a customer refuses to pay for the additional work. Do not risk a dissatisfied customer by skipping the call to Home Solutions. Oftentimes, we can help you resolve the situation in a way that makes everyone happy.
  - If the customer refuses to pay for unSKU'ed labor or parts, the servicer should chat/call Home Solutions immediately from onsite.
- Upsells and additional work mean additional money the customer wasn't expecting to spend and the possibility of needing to reschedule the service. That makes this situation one that can easily lead to customer disappointment. Be empathic to the inconvenience and financial cost additional services mean for the customer. Speak honestly and confidently to the customer. Do not be harsh or make the

customer feel that you are pressuring him/her to buy more services. If possible, show and explain to the customer why the additional work is necessary.

## Damage Claims

- Review all of your jobs before you start your day. Check over the Scopes of Work and your schedule of jobs for the day.
- Plan your day so that you do not have to rush through your appointments. If you are rushing to finish, you may not be as careful as you normally would be and might cause damage to the customer's home.
- Review the equipment on the order and ensure your crew is adequate to handle the items you will be delivering. Attempting to move a large item without enough people to assist can mean dropping the item or bumping it into the customer's walls or floor.
- Before bringing the product into the customer's home, measure all doorways and hallway to ensure the new product will fit. If you discover an area where the item cannot pass through easily, discuss the issue with the customer. Be very specific and show the customer the measurements. Explain that you do not want to risk damaging the customer's home.
- Point any existing damage out to the customer and document the type of damage on the paperwork and upload pictures in the Mobile App. Making a record of the existing damage will protect you from misunderstandings later. It is easy for the customer to notice a scratch or ding after we leave and assume it was caused by the recent service, when the scratch was there unnoticed for some time before we were in the home.
- Use protective gear to prevent any damage during the service. Home Solutions suggests using scuff shield, tarps, and wearing shoe covers to protect floors and counters. Carry a roll of paper towels or clean rags to clean up any drips or smudges. Park in the street whenever possible; however, if you must park in the customer's driveway, place an oil shield down to prevent stains.
- If you encounter a problem situation, such as an ill-fitting part, take your time to think through a resolution. A quick fix or forced fit can easily cause damage to the product or area around it.
- For appliances such as dishwashers, run a test cycle to determine that there aren't any leaks.
  - Test the Fill, Wash, and Drain cycles
  - Inspect all connections for leaks during each cycle.
- If at any time you notice new damage to the customer's home or product, report it to the customer immediately. Professionally explain the damage to the customer and inform him/her that Home Solutions will be in contact regarding a resolution.
  - Take picture of the damage and call Home Solutions immediately.
- To perform a service to the customer's expectations and secure an NPS promoter, we need to always display respect for the customer and their property.
- Damaging property because we are not prepared for the service or because we failed to take appropriate precautions makes the customer feel disrespected.
- Work the above tips into your daily routine to prevent future damage claims and/or NPS detractor.

## Sub Standard Installation

Sub-Standard Installations means that the service was not completed as it should have been. This can mean that the customer's product isn't working correctly, that the servicer didn't complete the scope of work by not performing a proper clean up or by failing to provide the customer with an educational demonstration.

- Prepare for each order by reviewing the Scope of Work. Read through the order history for any notes or additional instructions that detail special requests or give you extra information about what the customer is expecting.
- Plan your route so you have enough time to complete the entire job without rushing. When we rush, we miss things that might otherwise be part of the normal process.
- When you arrive at the customer's home, review the work you will doing with the customer. There are times where the customer's expectations do not match the service that was purchased. This can lead the customer to feel like the service is not completed. If there are any differences between the customer's expectations and the purchases services, discuss them with customer, and if additional services are needed, call Home Solutions immediately. The Home Solutions agent will advise of the next steps based on the client specific process for adding additional SKUs to the order.
- Before you show the customer the completed installation, test everything. For Home Theater, make sure all components work, not just that they turn on. Run a test cycle for dishwashers that goes through all phases of the cycle: fill, rinse, and drain. For other appliances, make sure that you turn on the item and test that its features are working. Does the microwave heat up a cup of water, do the oven and all burners on a range function, etc.?
- If something doesn't work, go back and correct the issue. If it turns out to be a product issue, show the customer what does work. Then call Home Solutions and report the problem immediately.
- Once you have tested that everything works the way it should, ask the customer to join you go through a demonstration of the product. Show the customer that everything works. Walk the customer how to use the basic features. Answer any questions the customer has about using their new product.
- Ask the customer is he/she is satisfied with service.
- Once the work is complete, make sure to clean up the work area. Gather all trash and packaging and remove it. Sweep up any dust and debris. Wipe down any surfaces so that we are not leaving behind smudges or fingerprints.

## Gas Leaks

- This should be the least opened escalation type and is a serious safety concern
- Ensure gas flow is turned completely off before disconnecting and removing the old unit
- Ensure we are utilizing a new gas flexible supply line on every job--- with the safety + valve (where possible)
- Secure and test all connections using an electronic gas sniffer (preferred) or at minimum liquid gas leak detector (usually called 'bubbles' or a soap solution)
  - o **Never test a gas connection with a lighter!**
- Use the manufacturer-approved sealant on all required gas connections (i.e.; Teflon pipe dope)
- Gas leaks are one of our most serious escalations.
- We need to do everything we can on the front-side to ensure a quality installation, every time—with customer's safety at front of our mind, every time.

## Water Leaks

- One of most common problems appliance customers report is post-installation dishwasher leaks.
- Ensure your techs have a small bucket, and rags/paper towels on their trucks to prevent and wipe up any small water leaks
- When removing the old dishwasher, put a rag or paper towel in the discharge hose(tight) to prevent spilled wastewater
- Put a bucket under the old supply line and/or the valve to catch any drips
- When installing the new dishwasher, be sure that all connections, hoses, and joints are secure. Check at least twice.
- Run a test cycle—both fill and drain---- and check all possible connections for leaks.
  - A trick here is to use a paper towel or blank sheet of paper (provided by the servicer) under connections as you are testing.
- Do not put the kick plate back on the dishwasher until testing is complete. Check under the connections to the unit and the water supply and drain
- Be sure that unit is leveled front to back and side to side.
- Ensure your techs have all proper materials on the truck to prevent and contain leaks.
- Utilize buckets/rags/paper towels to contain any minor leaks.
- Double-check or triple-check all connections using a new paper towel or sheet of paper under the connections while testing.

## Equipment Return

Servicers are responsible for product as soon as they take possession of the product at the pickup location. Servicers can be charged for any lost or damaged product is not properly documented.

- Review the scope of work and additional instructions before rolling on the job. Ensure you have the appropriate vehicle and screw to transport the items
- Inspect the product at the pickup location. Is there any damage to the packaging? If you spot damage, bring it to the attention of the store/warehouse employee. Open the carton and ensure the items is not damaged before accepting the product.
- If there is damage to the product, call Home Solutions immediately. Document the damage on your paperwork.
- Secure the item in your vehicle to prevent it being damaged in transport.
- Move the item with the appropriate crew size.
- Measure doorways, hallways, etc to ensure the item will fit.
- If there is any need to return the product, call Home Solutions from onsite to report the issue.
- Take the product back to the store no later than the next business day. We prefer that the item is returned the same day, whenever possible.
- Have a copy of the *Unit Return/Product Return* form ready when you arrive at the store/warehouse.
- Return the items and complete the form. We need to have a legible signature and date from the client employee on the form.
- Submit the form to Home Solutions that same day. You can either upload the form to DOLI or take a photo and attach it to the order using the Home Solutions Mobile App.

- If the form is not submitted to Home Solutions with a legible signature and date from a store/warehouse employee, you may be back charged for any missing/damaged items.
- Not returning uninstalled items in a timely manner delays the resolution of the customer's issues. Many clients cannot proceed with an issue until the previous product is returned. Failure to return product can cause the customer excess frustration and lead to negative NPS scores.

## Setting Arrival Windows

- Servicers need to set arrival windows for Best Buy, Mirror, Conn's (except Fitness) and all Appliance jobs. Home Solutions/the client will schedule the customer for a date. The service provider is expected to call the customer the evening before the scheduled appointment (roughly between 5pm - 9pm local time) and provide a 3-hour arrival window.
- Failure to provide an arrival window can lead to the customer having to wait around all day for the servicer to arrival. This will cause the customer a lot of inconvenience
- You must roll on the job, regardless of whether or not you speak with the customer.
- The arrival window needs to be logged in DOLI using the Appointments button on your DOLI homepage. Home Solutions agents are able to see the arrival window entered here and will use this to provide the customer an ETA if requested.

## Rejecting Jobs

- An important part of customer satisfaction is arriving on time for the originally scheduled appointment. That appointment is a promise to the customer and arriving late or having to reschedule is breaking that promise.
- Update your availability/capacity in DOLI using the Shifts page for each of your servicers. For appliance only servicers, update the availability in Route Manager regularly.
- Review your DOLI at least once a day to see if you have new jobs. You will see the "New Jobs" button on your DOLI homepage if you do.
- Job not accepted within 12 hours of being scheduled will be automatically SLA rejected and assigned to another provider.
- Review your new jobs to determine if you are able to complete those jobs on the scheduled date.
  - Review the Scope of Work, the customer's location, and the scheduled date and time.
  - Consult your Dispatch Board to see which jobs you have already accepted.
  - If for any reason you are unable to accept a job, decline that job. Enter the most accurate reason, including notes, explaining why you are unable to accept the job.
  - If you need to decline a job due to lack of availability, go back to DOLI and update your servicers' availability to reflect the correct working hours. This will prevent other jobs from being booked in that spot.
- If you accept a job, you will be expected to roll on that job and arrive on time during the currently scheduled date and arrival window. If you find you will not be able to do so, alert Home Solutions immediately.
  - Jobs scheduled for today or tomorrow, call Home Solutions immediately.

- o Future jobs, change the job status to “Needs Home Solutions inc Action - Declining Job - See Notes” status in DOLI. Enter detailed notes explaining why you are unable to take the job.
- If you have questions about the scope of work or become aware that the services or date on the order do not meet the customer’s needs, call Home Solutions. The Home Solutions agent will work with the customer, the client, and/or yourself to resolve the problem before it becomes a missed appointment.
- Not reviewing accepting new jobs in a timely manner leads to a lot of SLA rejects that can result in customers having to be rescheduled. Additionally, if Home Solutions isn’t notified about jobs that are accepted but you cannot complete as scheduled, these orders can end in a missed appointment and customer disappointment.

## **Failure to Update Mobile App**

- Not updating the Home Solutions Mobile App throughout the day can lead to several issues. Some clients, like BBY AI, require real time job updates and the Mobile App is the best way to make those updates.
- Updating the app cuts down on the need to call Home Solutions or receive calls from Home Solutions. Many onsite issues can be reported via the app. Additionally, Home Solutions agents are able to view the updates you enter and use those to address situations that come up throughout the day. This prevent Home Solutions from having to call you for updates and lets you focus on taking care of your customers.
- Allows you to use features such as taking photos or notes in the moments and real time job close outs.