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The Voice of the Customer.

An instrument: what to measure, how to ask, and what to do with the answer — Customer Satisfaction and Net Promoter Score, kept apart and administered properly.

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CONTROL

An instrument, not a play.

A model says how the organization is built. A play says what to do on Tuesday. An instrument says what to measure, how to ask, and what to do with the answer. This is the first instrument on the shelf, and it is the middle column of the Operating Model's funnel — *signs we see* — written out in full: two signals, two questions, two very different things to do with the replies.

VERSION	DATE	AUTHORITY	NOTES
1.2	November 2026	Juan Carlos González II	Where it started: the 2018 program, its five fixes and its six cohorts; replies routed through the Feedback Cycle on the 1-3-7 clock; what NPS can and cannot claim, said plainly
1.1	October 2026	Juan Carlos González II	First public edition, rebuilt from the internal program as a Juan.co instrument; the cohort calendar and the journey map are new
1.0	2018 – 2021	Juan Carlos González II	First run in 2018 at a hospitality-software company in the Vista Equity portfolio — six cohorts, surveyed twice a year; then, in April 2021, the Voice of the Customer program — NPS and CSAT — as SVP of Customer Success at a managed services provider; presented to leadership and run through 2021

HOW TO USE THIS INSTRUMENT

Read pages 4–6 once, for why one survey cannot do two jobs. Pages 7–8 are Customer Satisfaction and pages 9–12 are Net Promoter Score — each with the question, the scale, the arithmetic and the survey design; page 12 is the calendar. Page 13 is what to do with every reply, page 14 is how to stand the program up in a year, and page 15 is the checklist. Page 16 is where it started, in 2018. It assumes the Operating Model's four stages and twelve milestones, but stands without them.

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CONTENTS

What is inside.

I · Listening 4

One survey, two jobs 4

Generous listening has a purpose 5

Happiness and loyalty 6

II · Customer Satisfaction 7

What CSAT is 7

Calculating CSAT 8

III · Net Promoter Score 9

What NPS is 9

Detractors, passives, promoters 10

Transactional and relational 11

The calendar 12

IV · Responding 13

Closing the loop 13

Standing it up 14

The checklist 15

V · Where It Started 16

The 2018 program 16

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I · LISTENING

One survey, two jobs.

Most organizations have a Net Promoter Score. Fewer have a voice of the customer. A score is a number you report; a voice is a signal you act on — and the reason the score never becomes a voice is almost always the same: one survey, sent to everyone, after everything, asked to do two jobs at once.

When I took over a Customer Success organization in 2021 it had an NPS program, and an honest one. Here is what it did and did not do; if yours looks like this, this instrument is for you.

What the one survey did

Directional insight

On major customer-experience initiatives — whether a change had landed.

Departmental feedback

On the major stakeholder departments and their contributions.

Milestone measurement

Of critical points along the journey, for projects.

A history

A sample of past performance, for continuous improvement.

What it could not do

Tell a moment from a relationship

Transactional sentiment — how the last milestone went — from relational — whether they would stay.

Tell a person from a program

An individual customer's experience from the broader initiative they were part of.

Credit a team

Team members' contributions were never aligned to a single transaction, so nobody could be coached from it.

Scale

Manual — one person, a spreadsheet, a quarter.

None of that is a criticism of the survey; it is a criticism of the job description. One question cannot measure both how the last ticket went and whether the account will renew — different causes, different owners, different remedies. The fix is not a better survey. It is two instruments, and a rule for which to use when.

ACTIVITY	SIGNALS · THIS INSTRUMENT	RESULTS
Things we do	**Signs we see**	**Success we share**
Proactive touchpoints	Customer health	Gross revenue retention
Reactive escalations	Net Promoter Score	Net revenue retention
Success engagements	Customer Satisfaction	Lifetime value

The Operating Model's results funnel. Signals are the only layer the customer writes; this instrument is that column.

I · LISTENING

Generous listening has a purpose.

The voice of the customer is everything a client tells you about their experience with you, whether or not they meant to. Feedback becomes insight only if it is three things.

CONSOLIDATED

Unified across sources

One record of the account's sentiment — survey replies, support tone, the thing the champion said on the call — not five systems each holding a piece.

ACTIONABLE

Contextualized against a challenge

A score next to the problem it describes. A 6 with no context is a mood; a 6 the week after a failed migration is an action.

OPPORTUNISTIC

Drives continuous improvement

Every reply is an invitation: to fix, to follow up, to ask for the referral, to tell the product team. A reply nobody acts on teaches the customer not to reply.

A program that earns those three words meets five criteria, in order. It **captures** feedback at listening posts across every touchpoint and department of the journey. It **maximizes** the impact of client operations by connecting playbooks directly to retained revenue and lifetime value. It **analyzes** what is happening with customers in real time and surfaces the insights. It **acts** on the key drivers of the client experience and turns them into a roadmap. And it **monitors** performance over time, against metrics it published in advance.

01
Capture
Listening posts at every touchpoint.

→

02
Maximize
Playbooks tied to retention and LTV.

→

03
Analyze
Real time, surfaced, not filed.

→

04
Act
Key drivers become a roadmap.

05 MONITOR · OVER TIME, AGAINST THE METRICS YOU PUBLISHED

Loyalty — the macro

Measure the attitudes and behaviors of clients to help us grow our revenue.

ALIGNED TO **The brand, the whole relationship**
INDEXED ON **Nothing — not a moment**
INSTRUMENT **Net Promoter Score**

Happiness — the micro

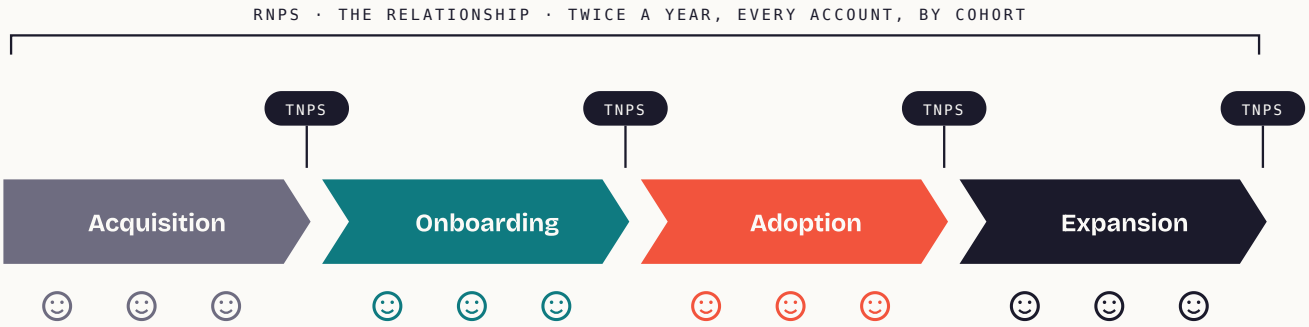
Measure the satisfaction clients have with how we are delivering the experience.

ALIGNED TO **A team, a person, a product**
INDEXED ON **A recent interaction**
INSTRUMENT **Customer Satisfaction**

I · LISTENING

Happiness and loyalty.

Two instruments, on one journey. Satisfaction lives inside the stages, after the moments. Net Promoter lives at the edges of the stages and over the whole relationship.



CSAT · THE MOMENT · AFTER EVERY TICKET, INCIDENT, CONTRACT AND INVOICE
TNPS · THE JOURNEY · WHEN A STAGE IS COMPLETE, TO EVERYONE WHO COMPLETED IT

CSAT

Measures happiness after a touchpoint

Completing a transaction

Closing an incident, resolving a ticket.

Concluding a workflow

Signing a contract, paying an invoice, finishing a project phase.

Correlates to

The retention of a customer, one moment at a time — the sum of small verdicts.

NPS

Measures whether they would recommend us

Comparable

Apples to apples — the same question to equivalent populations, so the whole journey can be evaluated.

Neutral to any touchpoint

It closes the feedback loop on the relationship, not on the last interaction.

Correlates to

The affinity of the client, regardless of the experience they just had.

The discipline is in keeping them apart. The moment you ask a Net Promoter question at the close of a ticket, you have measured the ticket and called it loyalty; the moment you average satisfaction scores across a year and present them as the health of the account, you have measured moods and called it a relationship. Each instrument answers one question well. Neither answers the other's.

II · CUSTOMER SATISFACTION

What CSAT is.

Customer Satisfaction measures the delight a customer takes in the service they received and in the quality of our people and products. One question, one moment, a scale of one to five.

THE QUESTION

"How would you rate your satisfaction with the [service] you received?"

1	2	3	4	5
Very unsatisfied	Unsatisfied	Neutral	Satisfied	Very satisfied

The bracket is the design. *[Service]* is the thing that just happened — the incident, the ticket, the onboarding phase, the invoice — named explicitly, so the customer rates that and nothing else. A satisfaction question with no object becomes a loyalty question by accident.

CSAT must be

Incident-based

On a moment. Sent at the close of the event it asks about, while the event is still the thing the customer remembers.

Indicative of team success

The score belongs to the team and the person who delivered the moment. That is what makes it coachable.

Directly correlative to revenue

Satisfaction is the earliest, cheapest leading indicator of retention you will ever have.

Actionable by managers

A manager reads it weekly and changes something: a process, a script, a staffing choice.

CSAT is not

A relationship score

A customer can be delighted with every ticket and still leave, because the product stopped mattering to their business.

An annual number

Averaged across a year it tells you the team's temperament, not the customer's.

Optional

It goes out after every qualifying event, automatically, from the system that closed the event. A survey a person remembers to send is a survey that measures the person.

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II · CUSTOMER SATISFACTION

Calculating CSAT.

Two numbers come out of the same replies, and they are for different readers. One drives improvement; the other predicts retention.

4.1 QUARTER AVERAGE

Composite Customer Satisfaction Score

The average of all CSAT responses in the window — "3.9 lifetime," "4.1 this quarter." This is the coaching number.

- Drives continuous individual and group improvement.
- Reported by person, by team, by department and for the organization — and on both sides of the relationship: by customer, by customer team, by customer contact.
- Read as a trend. A composite that moved a tenth of a point is a team that changed something.

83% SATISFACTION RATING

Satisfaction Rating

The percentage of all responses at a 4 or a 5 — "an 83% Satisfaction Rating." This is the leadership number.

- Directly correlative to retention in the short term: the share of moments that went well is the share of reasons to stay.
- Immune to the middle. A 3 is not half a 5; it is a customer who did not get what they came for and did not complain.
- Read as a threshold. Set the bar, publish it, hold every team to it.

Report both, always together, never interchanged. The composite answers "are we getting better?" and the rating answers "are we good enough?" — and a team can be improving fast while still below the bar, which is exactly the situation a manager needs to see in two numbers rather than argue about with one.

> **WHERE IT COMES FROM**
>
> The survey is delivered by the system that closed the event — the service desk at the close of every service request and incident, the success platform at the close of every project phase and workflow. Not by a person, not by a weekly batch, not by a form the customer has to find. Delivery that is automatic is the difference between a satisfaction program and a satisfaction anecdote.

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III · NET PROMOTER SCORE

What NPS is.

Net Promoter Score measures the loyalty of customers to us — their willingness to put their own name behind ours. One question, scored for a segment as a single number from −100 to +100.

THE QUESTION

"How likely is it that you would recommend [us] to a friend or colleague?"

Note what the question does not mention: a ticket, a project, a person, a product. It asks about *us*. That is why it belongs at the edges of the journey and over the whole relationship, and why it cannot be sent in the same breath as a satisfaction question — a customer asked both at once will answer the one they just lived through, twice.

NPS must be

Reflective of the journey

Asked at points where a customer has experienced enough of us to have an opinion about us — the end of a stage, or the relationship as a whole.

Indicative of company success

The score belongs to the company, not a team. It is the one number the whole organization shares — which is the point of "we are all Customer Success."

Built to measure growth

It must measure the capacity of the existing client base to drive growth through referral — promoters are a pipeline.

Visible across every client entity

On every system of record — the success platform, the CRM, the service desk — so that anyone who touches the account sees the last reply before they do.

NPS is not

A satisfaction score

A promoter can have had a terrible week with us. A detractor can have had a flawless one. The question is about affinity, not the last experience.

A team metric

Putting NPS on a support team's scorecard makes them responsible for the roadmap, the price, and the sales promise. Give them CSAT; give the company NPS.

One number

It is one number per segment. The company-wide score is the least useful of them.

A prediction

It is not a model. Its link to what customers actually do is weaker than its popularity suggests; use it to find the people to talk to, not to forecast the year.

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III · NET PROMOTER SCORE

Detractors, passives, promoters.

Eleven answers, three kinds of customer. The categories are not a grading curve — they describe what the customer will *do*.



SCORE 0–6

Detractors

Unhappy clients who will damage our reputation through negative word of mouth. They are not neutral; they are actively costing us the next customer.

SCORE 7–8

Passives

Satisfied but unenthusiastic customers, vulnerable to competitive offers. They will not leave over a bad week; they will leave over a better price.

SCORE 9–10

Promoters

Happy loyalists who keep buying and fuel growth by referring new customers. They are the only marketing you do not pay for.

20 − 30 = −10

A WORKED EXAMPLE

Scoring

Subtract the percentage of detractors from the percentage of promoters. Passives count in the denominator and nowhere else: if 30% of respondents are detractors, 50% passives and 20% promoters, the score is 20 − 30 = −10. A segment can have a majority of satisfied customers and a negative score, and that is the instrument working.

Weights

Every respondent gets one vote in the company-wide calculation. Segment calculations are weighted by account ARR — because a detractor paying a million is a different fact from a detractor paying ten thousand, and the segment score should say so.

Segmentation

- **Company** — all responses, each month: the headline.
- **Lifetime-value segment** — aligned to the segmentation model: the one that predicts revenue.
- **Industry** — aligned to the go-to-market verticals: the one that steers engagement.

Read the segments before the headline. A company score is a weather report; a segment score is a forecast for a place you can actually go.

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III · NET PROMOTER SCORE

Transactional and relational.

The same question, asked two ways, measures two kinds of loyalty. This is the part most programs skip, and it is the part that makes the number mean something.

TNPS · TRANSACTIONAL

Loyalty at the end of a journey

Measures loyalty when a client completes a major journey, and shows their willingness to increase their investment with us.

Survey sample

When a customer completes an entire journey — not a ticket, a stage — they receive the survey. Also the instrument for managing loyalty through change: a migration, a platform move, a re-org on either side. Respondents must be segmented into directly comparable, equivalent populations: "all buyers," "all onboarders."

Journey segments

Acquisition — loyalty garnered through buying.
Onboarding — loyalty fostered through projects.
Adoption — loyalty fostered through engagements.
Expansion — loyalty fostered through renewal.

Reporting

Replies are visible as a sub-segment report, per account and per contact, tagged with the journey segment or the change initiative that triggered them. Technical account management produces an assessment of journey loyalty: performance, impact, and recommendations for the stakeholders who own the process.

RNPS · RELATIONAL

Loyalty in the absolute

Measures loyalty in the absolute sense, and should reflect a client's willingness to grow with us.

Survey sample

Established customers, surveyed twice a year — once every six months. Customer contacts are divided into six cohorts, surveyed on a staggered basis, so that the whole book is read every half-year and some of it is read every month.

New customers

Eligible once they have completed onboarding and finished a preliminary adoption exercise — never before, because a relationship score taken during onboarding is a project score in disguise. Assignment to a cohort requires the Success team to validate onboarding and adoption readiness.

Reporting

Replies are visible per account and per contact across every system of record. Success management produces a monthly Net Promoter report — in general and by segment — with guidance: what moved, why we think it moved, and what we are doing about it.

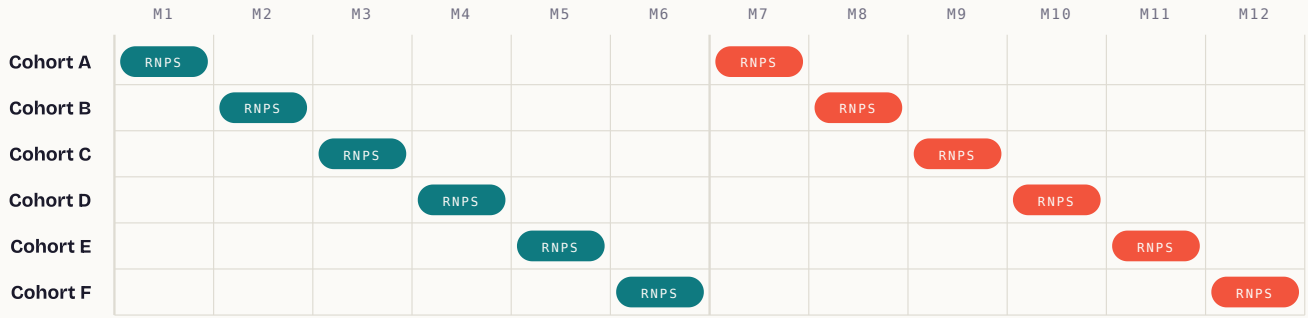
The two scores disagree, and the disagreement is the insight. A high tNPS and a falling rNPS is an organization that executes well on a product the customer is losing faith in. A low tNPS and a steady rNPS is a loyal customer being worn down one project at a time. One survey would have averaged those into a shrug.

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III · NET PROMOTER SCORE

The calendar.

Relational NPS runs on a clock, not a trigger. Six cohorts, each surveyed twice a year, six months apart — so a cohort goes out every month and no customer is asked more often than they should be.



ONE COHORT EVERY MONTH · EVERY CONTACT TWICE A YEAR · THE WHOLE BOOK EVERY SIX MONTHS
NEW CUSTOMERS JOIN THE NEXT OPEN COHORT ONCE ONBOARDING AND ADOPTION ARE VALIDATED

Three things the calendar buys you. **A monthly reading.** Every month some sixth of the book answers, so the monthly report is real data, not a re-cut of last quarter's. **A clean comparison.** Cohort A in month one is compared to Cohort A in month seven — the same people, six months apart — which is the only like-for-like comparison a relationship score can make. **Fatigue control.** A contact hears the relationship question twice a year and the satisfaction question only after things they asked us for; nobody is surveyed into silence.

> TRANSACTIONAL NPS DOES NOT USE THE CALENDAR
>
> It uses the journey. A stage completes — a deal closes, an onboarding project ends, an adoption engagement wraps, a renewal signs — and everyone who completed it is asked, as a population, tagged with the stage. It fires when the milestone fires, which is why the Operating Model's twelve milestones and this instrument's four journey segments are the same four stages: the model tells you when a stage is complete, and the instrument tells you how it felt.

Illustrative: six cohorts, twelve months. Assign cohorts by contact, not by account, and keep an account's contacts in the same cohort so the account reads as one voice.

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IV · RESPONDING

Closing the loop.

A reply is a request. The two instruments route their replies differently, and the asymmetry is deliberate: satisfaction reaches out to the unhappy; Net Promoter reaches out to everyone.

INSTRUMENT	REPLY	WHO REACHES OUT	TO DO WHAT
CSAT	**1, 2 or 3**	**Team management**	Remediate the experience. The manager of the team that delivered the moment calls, listens, and fixes what can be fixed — delivering the right result, not an apology for the wrong one. The reply is also the coaching conversation for the person who delivered it.
CSAT	**4 or 5**	**Nobody**	Nothing. A satisfied customer who is thanked for every ticket learns that replying costs them a conversation. Count it, report it, leave them alone.
NPS	**Promoters · 9–10**	**Success, then Sales**	Thank them and make the ask — at their milestone, not ours — then hand the opportunity to Sales to pursue: the reference, the case study, the introduction, the expansion. This is the pipeline the instrument exists to find.
NPS	**Passives · 7–8**	**Success, then Renewals**	Ask what would make it a ten, and answer it. Renewals carries the answer into the renewal conversation, where the reason to be a promoter gets made.
NPS	**Detractors · 0–6**	**Success**	A structured call, booked the same day. A detractor is rarely one team's doing; the Customer Success Manager runs the Feedback Cycle and pulls in whoever the answer needs.

Every Net Promoter respondent hears from us, because the question was about the relationship and a relationship question answered into silence is worse than not asking. **Only** the unhappy satisfaction respondents hear from us, because the question was about a moment and the moment is over. Get those two rules backwards — thank every CSAT reply, chase only NPS detractors — and you have a program that annoys the happy and ignores the loyal.

> THE SPEED RULE
>
> A satisfaction remediation call happens within one business day of the reply. A Net Promoter reply runs on the 1-3-7 standard, through the Feedback Cycle: acknowledged by a person the same day, answered with options within three days, agreed within seven. Later than that and the customer has forgotten what they told you, and the call becomes a survey about the survey.

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IV · RESPONDING

Standing it up.

The program I ran went from one manual survey to a fully automated sentiment regime in three phases over three quarters: a stair-step up to the standard that runs for the rest of the year, and every year after. The phases are reusable; the quarters are a floor, not a target.

PHASE ONE · FIRST QUARTER

Disengage and re-engage

Stop the manual survey. Configure the systems — the success platform and the service desk — to run CSAT and NPS automatically. CSAT goes out at the close of every service request and incident; NPS goes out to cohorts, on the calendar. The old number ends and the new ones begin on the same day, so there is no quarter with two sets of books.

PHASE TWO · SECOND QUARTER

Measure and analyze

Build the reporting that turns replies into outcomes and key results for both instruments — the composite and the rating for CSAT, the segment scores for NPS. Customer Success reports to leadership and to management on both, monthly, with guidance. The first full cohort cycle completes; the first like-for-like comparison becomes possible.

PHASE THREE · THIRD QUARTER

Benchmark and synthesize

Establish a customer-sentiment reporting regime that is fully automated — nobody assembles the monthly report by hand. Customer Success runs the weighted segmentations, and the outreach baseline is engaged: every routing rule on the previous page is live, owned, and measured for speed.

Two failure modes to design against. The first is running the old survey "in parallel, just for continuity" — it never ends, and it teaches the organization that the new numbers are provisional. Disengage means disengage. The second is building the reporting before the delivery is automatic: a beautiful dashboard fed by a spreadsheet is the manual program with better fonts.

We are all Customer Success.

That was the last slide of the program, and it is the reason NPS belongs to the company and not to a team. Every department shows up in the customer's answer to "would you recommend us?" — sales in the promise, delivery in the project, support in the ticket, finance in the invoice. The instrument makes that visible. The organization decides what to do about it.

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THE CHECKLIST

Print this page.

DESIGN

- [ ] Two instruments, two questions, written down verbatim
- [ ] CSAT's [service] object defined for every qualifying event
- [ ] Qualifying CSAT events listed: requests, incidents, phases, workflows
- [ ] tNPS journey segments mapped to the four stages
- [ ] rNPS cohorts: six, by contact, an account's contacts together
- [ ] New-customer eligibility rule: onboarding done, adoption exercise done, validated by Success
- [ ] Segments defined: company, lifetime-value, industry
- [ ] ARR weights agreed for segment scores

BEFORE LAUNCH

- [ ] Service desk sends CSAT at close, automatically
- [ ] Success platform sends tNPS at stage completion, automatically
- [ ] rNPS calendar loaded; first cohort assigned
- [ ] Replies visible per account and per contact on every system of record
- [ ] Routing rules live, with an owner per row
- [ ] Speed rule published: one day for CSAT, five for NPS
- [ ] Old survey end date set, and the same day as the new start

EVERY WEEK

- [ ] Managers read their teams' CSAT composite and rating
- [ ] Every 1, 2 and 3 has a remediation call logged
- [ ] Every promoter has a Sales follow-up logged

EVERY MONTH

- [ ] Cohort surveyed on schedule
- [ ] NPS report issued: company, segment, industry, with guidance
- [ ] Detractor interventions reviewed by Success leadership
- [ ] Passive playbooks confirmed running in Renewals

EVERY QUARTER

- [ ] tNPS journey-loyalty assessment issued per stage
- [ ] Composite trend and rating threshold reviewed by leadership
- [ ] Like-for-like cohort comparison read; what moved, why, what next
- [ ] Routing speed measured and published
- [ ] Outreach baseline re-set if the book changed shape

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V · WHERE IT STARTED

The 2018 program.

The first version ran in 2018 at a hospitality-software company in the Vista Equity portfolio. It began with a memo I wrote to the CEO after a month when the survey went out and almost nobody answered — and the five fixes in it are still the first things I check.

Five fixes, from the memo

ONE	Stop flooding customers with email. Coordinate every customer-facing call to action through Success, and send no more than one every seven days.
TWO	Make the survey email simple: say how long it takes, why you are asking, and how the answer will be used — and that someone will follow up.
THREE	Send it from your own domain, authenticated, not from the survey vendor's.
FOUR	Ask outside email too: in the product, triggered by events, and by text message.
FIVE	Survey by the middle of the month, or earlier, so there is time to follow up before the next one.

Six cohorts

Twice a year

Every established customer contact in one of six cohorts, A through F, each surveyed every six months on a monthly, staggered calendar.

New customers

Assigned to a cohort once onboarding and early adoption are done, and surveyed within six months.

Kept clean

Contacts who are inactive, or no longer work at the customer, come out of the cohort.

What it was for

Five uses

Identify referral targets. Analyze loyalty by segment. Create community. Convert detractors. Evolve the brand.

Three principles

Segment the responses. Engage the detractors. Survey every customer.

And one caution

NPS is not a model or a predictive tool. It is a way to find the customers worth a conversation.

By 2021 the program had learned four more things: survey only contacts who opted in, and only when nothing else is happening to them; read the results at seven and at thirty-one days; send the transactional survey when a renewal closes, won or lost; and keep every survey answer in one place, so the plays can act on it.