

The Ultimate Question, by Fred Reichheld, © 2006

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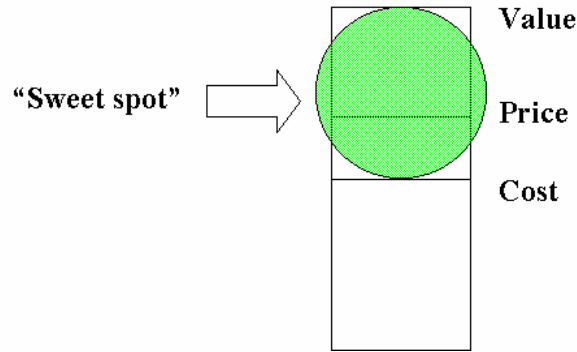
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Part One – Why The Ultimate Question Works

Chapter 1 – Bad Profits, Good Profits and the Ultimate Question

- Bad profits are earnings that do not endure, earnings that are not based upon a satisfied customer. Bad profits leave a customer feeling bad about their experience with a company. Bad profits are earned at the expense of the customer relationship. *“Bad profits are about extracting value from customers, not creating value.”*
 - Examples:
 - Phone companies that lock customers into long term contracts and then don’t give them a lower rate when the market changes for new customers.
 - Drug companies paying doctors to “push” new drugs while carefully “quashing” studies that might question the efficacy of such drugs.
 - The cost of bad profits is often carried like a virus by “DETRACTORS,” the customers who feel so badly treated that they cut back on purchases, switch to a competitor if they can and tell others about the company’s bad service.
 - AOL is a company that has been hooked on bad profits. AOL grew memberships after their IPO in 1992 by carpet-bombing the country with free software diskettes. Their membership grew dramatically and their network became overloaded, leading to several high profile blackouts in 1996. AOL’s monthly customer loss rate rose to 6% and they turned to advertising to boost current earnings. By 2002, 42% of the company’s customers were DETRACTORS.
- True growth is hard to find: Bain & Company study found that only 22% of the world’s major firms achieved real, sustainable growth of even 5% a year over the ten-year period from 1994 to 2004.
- Good profits are earned by the creation of value. (As Herbert Marcus of Neimann Marcus once said, “It’s never a good sale for Neiman Marcus, unless it’s a good buy for the customer.”)
 - Example companies: Amazon.com, Vanguard Group, Southwest Airlines, Costco, Northwestern Mutual, eBay, The Four Seasons Hotels, Enterprise Rent-A-Car, Intuit.
 - When you earn “good profits,” your customers become “PROMOTERS.” They sing your praises to their friends and colleagues.
 - When you earn “good profits,” you can achieve “true growth.”
 - At the heart of good profits, Reichheld believes you will find the Golden Rule. There are no shortcuts to good profits. You must do things for your customers, over the long-term, that you would want someone to do for you.
 - [TMP: Company’s create value for their customer by delivering products with value in excess of their price.]



- Loyalty is the key to profitable growth.
- A systematic feedback mechanism is required in order to turn a company's desire to act in accordance with the Golden Rule into good profits and true growth.
- One Bain study showed that a 5 percent increase in customer retention can yield anywhere from a 25 percent to 100 percent improvement in profits.
- Another Bain study showed that companies with the highest customer loyalty (loyalty leaders) typically grew revenues at more than twice the rate of their competitors.
- If loyalty leads to good profits which leads to true growth, then what is needed is a *"system to measure loyalty in a way that makes individuals accountable for results....what gets measured creates accountability."*
- Reichheld is not a fan of traditional satisfaction surveys. He calls it a pseudoscience; says it is stuck in the dark ages, managed by marketing and not operations...surveys are generally too long and a waste of time.
- Bain did research and experimentation to come up with a metric that helps companies tell the difference between good profits and bad. It is simple, but is only useful if it is implemented as part of larger system.

• The Ultimate Question: How likely is it that you would recommend this company to a friend or colleague?

• The metric this question produces is called the Net Promoter[®] Score (NPS).

- Scores are on a 0 to 10 scale.
 - PROMOTERS answer 9 or 10.
 - Passives answer 7 or 8.
 - DETRACTORS answer 0 through 6.
 - $NPS = PROMOTERS \text{ minus } DETRACTORS$
- For the average firm, 66% or more of the customer are passives (bored) or DETRACTORS (angry).
- [TMP: One of my first questions was, "what else are you going to ask the customer, beside the "would recommend" question? The answer depends on your situation, but it usually means one or a few follow-on questions. You might ask, "what was the most important reason for the score you gave?" Reichheld even spotlights Enterprise, who has a 1 to 5 scale system, to show their commitment to a simple survey system. The point of the book is not a hard-boiled formula, but that a company can find good profits and true growth by a) simplifying their customer feedback process to a single question with a few

follow-on questions and b) asking these questions systematically and consistently across all businesses and/or divisions.]

Company	NPS*
USAA	82%
HomeBanc	81%
Harley-Davidson	81%
Costco	79%
Amazon.com	73%
Chick-fil-A	72%
eBay	71%
Vanguard	70%
SAS	66%
Apple	66%
Intuit (Turbo Tax)	58%
Cisco	57%
Fedex	56%
Southwest Airlines	51%
American Express	50%
Commerce Bank	50%
Dell	50%
Adobe	48%
Electronic Arts	48%

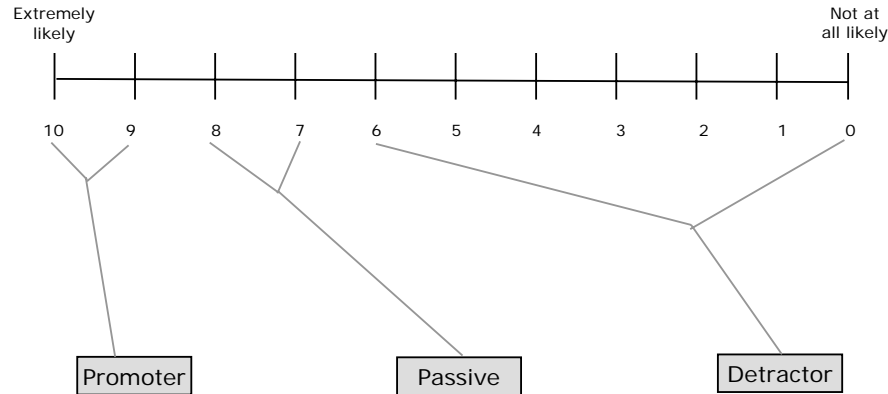
* Statistics based on Bain/Satmetrix studies...

Chapter 2 – The Measure of Success

- Bain & Company and Reichheld have been studying loyalty for years.
- When businesses were small, you knew exactly how your customers were feeling. As businesses got larger, knowing your customers becomes harder. One way to think about customers is to look at what products are selling and whether you are making a profit on them. Another way is through market-research: doing surveys to understand how customers are feeling.
- However, market research is often left in the hands of marketing and not operations. In addition, there's no guarantee of a correlation between satisfaction rates and actual customer behaviors.
- Bain did a study to understand which questions are most correlated to customer loyalty. How likely are you to re-purchase? How would you rate the overall quality? How strongly do you agree that company X deserves your loyalty? They used a firm called Satmetrix Systems (www.satmetrix.com), on whose board Reichheld sits. They hoped to find one question for each industry that effectively predicted what customers would do and therefore helped predict a company's growth.
- What they found, however, was that one question worked best for most industries. That question is the "would recommend" question.

Mapping responses to the ultimate question

"How likely is it that you would recommend Company X to a friend or colleague?"



- On reflection, Reichheld thinks that this question makes sense, because a recommendation is the highest praise you can give to a company; you're encouraging others you care about to share in the value you have received.
 - The "would recommend" question is not necessarily the best question for all industries. Reichheld encourages companies to validate the link between survey questions and answers and those customers behavior (buying patterns). In business-to-business settings, an appropriate question might be: "How likely is it that you will continue to purchase products or services from Company X?" (Later, Reichheld addresses the issue of how to gather data when you sell to retailers who then sell to customers.)
 - Intuit example of using NPS:
 - Added NPS onto existing surveys
 - Took away some of existing surveys
 - Segmented recommendations by PROMOTERS, Passives, DETRACTORS
 - Found differing issues:
 - DETRACTORS wanted better tech support (not from India)
 - PROMOTERS wanted improved rebate process
 - NPS provides actionable insights for Intuit and is now a part of every strategic plan, every operating bonus, every executive's bonus, every monthly operating review.
- Reichheld believes NPS should be reported to management as frequently as management gets financial updates.

Chapter 3 – How the Net Promoter Score (NPS) Can Drive Growth

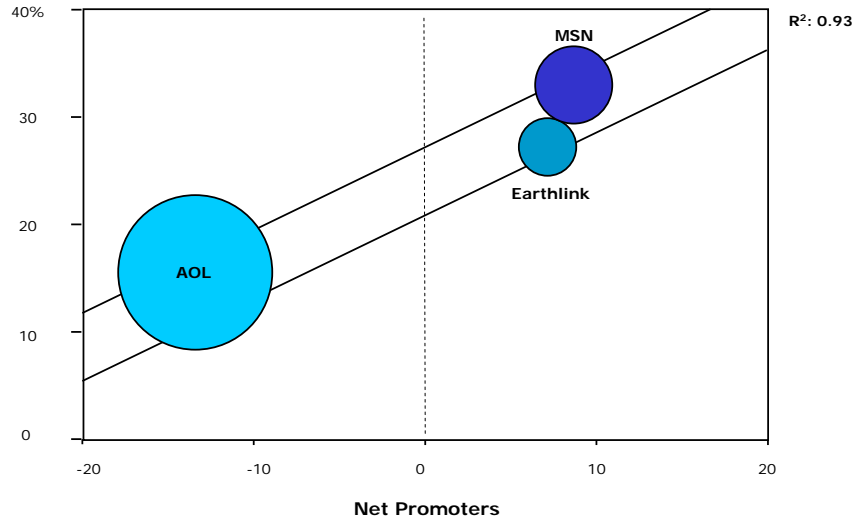
- *In a company of our size and complexity, it becomes critically important to simplify and focus on one number that is practical to measure. It is also vital that this metric reliably link to profits and growth. Our experience with satisfaction surveys has not been very good because they don't connect to*

business economics. But as we saw at GE Healthcare, NPS links well to both market share and profitability. Gary Reiner, Chief Information Officer, GE

- There is strong evidence that NPS is correlated to growth.
 - The graph below is one of six from the appendix of the book.

Internet Service Providers

Three-year growth (1999-2002)



Source: Satmetrix NPS survey (Q1-Q4, 2002); company annual report.

- Conceptually, Reichheld points out that businesses who get referrals have an unpaid sales and marketing team working on their behalf. Referrals come from PROMOTERS.
- Employees and, especially, managers of the NPS-leading companies in the book earn salaries in excess of their competitors. This includes a) HomeBanc, where mortgage originators earn as much as \$1 million per year, and b) Chick-fil-A, where restaurant managers, on average, earn \$170,000 per year.
- Why NPS Works
 - You need to understand the value of your customers.
 - The traditional approach is to calculate the lifetime net present value of a customer.
 - The problem with this approach is that not all customers are the same, especially in terms of their value.
 - Retention rate: DETRACTORS have a lower retention rate and, therefore, a much lower overall value.
 - Margin: PROMOTERS are generally less price sensitive and, therefore, have a higher overall value.
 - Annual spend: PROMOTERS tend to spend more and are more receptive to cross-selling.
 - Cost efficiencies: DETRACTORS complain more and, hence, cost more.

- Word of mouth: PROMOTERS have higher value than the average customer because of the additional business they can bring to your organization. DETRACTORS work in reverse. Bain studies have shown it takes three to ten positive comments about a company to make up for one negative comment.
 - The solution is to calculate the NPV of PROMOTERS and DETRACTORS. Reichheld goes through a detailed analysis of Dell customers to show how someone can go about this calculation.
- NPS and Market Share
 - When a company focuses on market share, they often fall into the trap of bad profits. When you dominate your market, you have little incentive to think about good profits and bad profits. Instead, you are probably just focused on growing earnings.
 - The point is that when a company focuses on NPS, they are focused on good and enduring profits.

Part Two – How To Measure Responses

Chapter 4 – The Enterprise Story – Measuring What Matters

- Enterprise grew from \$2 billion in revenues in 1994 to \$7 billion 2004. The CEO largely credits this success to their customer feedback system.
- ESQi stands for Enterprise Service Quality index and was created by Enterprise in 1994. Previous Enterprise surveys suffered from “question creep.” ESQi was a single page containing 9 questions, the most important of which was:
 - “Overall, how satisfied were you with your recent car rental from Enterprise?”
 - Customers could check five boxes from “completely satisfied” to “completely dissatisfied.”
 - Survey methodology was attacked internally by low scorers.
 - Initial results told them that high scorers were independent of branch size or geographic region.
- Enterprise made 3 important changes:
 - Focused surveys on the appropriate granularity, which was each of the several thousand branches, not the larger regions.
 - Made survey results timely so that they could be acted upon by each branch.
 - Analyzed responses and correlated them to repurchases and referrals. The “were you completely satisfied” question accounted for 86% of the customers who did repurchase or refer.
- Taking ESQi seriously.
 - 1. Linked ESQi scores to corporate recognition.
 - 2. Listed ESQi scores in every monthly operating report.
 - 3. Constantly communicated the importance of the ESQi ratings.
- Why ESQi works.

- Tight focus. When surveyor (3rd party) gets a dissatisfied response to the “completely satisfied” question, he or she immediately asks if someone could call them to talk about it. That someone is not in marketing, but someone in operations who can do something about whatever is the problem. ESQi is not a market-research program; it is an operating tool.
- Operational accountability. Responsibility for ESQi moved out of market research and into operations.
- Timeliness and high participation rates. Enterprise surveys customers within days of their experience and, because their survey is so short, they experience participation rates of 95% or more.
- The Closed Loop. Enterprise asked its survey vendor to NOT diagnose the root cause of the customer’s score. Enterprise knew that doing the root cause analysis would take four or five follow-up questions and require knowledge that the survey vendor did not have.
- A link to the economics of the business. Enterprise has reduced DETRACTORS from 12 to 5%, which improves word of mouth and drives growth and reduces costs.
- Continuous evolution. Enterprise has continued to focus on improving the ESQi system. To solve a seasonal drop in ESQi scores, they began reporting ESQi on a weekly basis, thereby helping new seasonal hires understand more quickly the importance of ESQi to the company.
- How ESQi Drives Improvement
 - Training. Enterprise develops training geared towards ESQi.
 - On-the-spot fixes. Managers encouraged to not use “survey language” at the branch, but to fix issues on the spot. “Is there anything we can do to serve you better?” Managers know that company values making money AND ESQi results.
 - Experimentation. Managers and employees try things to improve their scores. They figure out what customers want.
 - Closing the loop even faster. Branches seek to get feedback and make improvements daily.
 - Learning from the best. Corporate executives understand that they should be looking for ideas from the branches and from the branch managers who have great ESQi scores.
 - Pitfalls/Prerequisites:

- Honesty & Integrity. Falsifying their ESQi scores can have career-ending consequences at Enterprise.
 - Vote For Growth: One branch decided that each week each employee would vote on the quality customer service of each of the other employees over the previous week. Votes are tallied and posted.

Chapter 5 – Why Satisfaction Surveys Fail

- “...*You cannot build an effective customer-feedback system on the shaky foundation of current satisfaction-survey methods and practices.*”
- Top 10 Reasons That Satisfaction Surveys Are A Joke:
 - #10: Too many surveys, too many questions. Self-evident.

- #9: The wrong customers respond. Statistical sampling gets the people who have time to fill out the surveys, not necessarily the PROMOTERS or DETRACTORS.
- #8: Employees don't know how to take corrective action. Surveys don't give employees the ability to close the loop with customers who make suggestions or report their dissatisfaction.
- #7: Too many surveys are marketing campaigns in disguise.
- #6: Scores don't link to economics. You have to find a question that links to the economics of your organization. Intent to repurchase is not a proxy for loyalty; 60-80% of customer defectors (they later left) scored themselves as satisfied or very satisfied...satisfaction is too low of a hurdle.
- #5: Plain vanilla solutions can't meet company's unique needs. Most are not timely and not targeted and too complicated.
- #4: There are no generally accepted standards. Reichheld promotes the idea of creating standards for customer surveying along the lines of GAAP for accounting. One bank's statisticians thought that satisfaction was related to customer attrition, but operating managers pointed out that the driver to growth and profits in credit cards was not customer retention but instead customer usage. They were looking at the wrong measure.
- #3: Surveys confuse transactions with relationships. Companies need to go beyond transactions and start focusing on relationships. Moreover, even within relationships, the ultimate question has to get at the real drivers of growth and profitability.
- #2: Satisfaction surveys dissatisfy customers. Surveys tend to piss people off. Harley Davidson has recent retirees call and listen to customers.
- #1: Gaming and manipulation wreck the credibility of traditional surveys.

- No survey will work if the intent is not honest.
 - Reichheld talks at multiple points about the Golden Rule.
 - Surveying must start with a company's intent to make an honest profit.
 - All people at all levels of the organization must:
 - Have a good system to work with.
 - Behave honorably.
 - Gaming the system is sure-fire evidence that a company's surveying system is not working.

Chapter 6 – The Rules Of Measurement

- Developing a measurement system, just like GAAP for accounting, takes time. The following principles will help achieve the goal: “to calculate your customer's promoter status in a fashion that is accurate, granular, timely and credible.” These principles will also drive accountability for good customer relationships into your organization.
 - Principle 1: Ask the Ultimate Question and Very Little Else.
 - Principle 2: Choose a Scale That Works and Stick To It. Enterprise uses a scale with five responses. Ebay has a 3 point scale. Reichheld likes the 0

to 10 because there's never any question about which end is the good end. No one wants a zero.

- Principle 3: Aim for High Response Rates from the Right Customers.
 - Focus on your core customers.
 - If you're response rates are not 65%, you're not hearing from enough customers.
 - In B-to-B situations, use a "quarterback" at the client to ensure that you are getting the right mix of the various customer respondents.
 - Don't use gimmicks.
- Principle 4: Report Relationship Data as Frequently as Financial Data. Publishing NPS with financial information enhances its importance.
- Principle 5: The More Granular the Data, the More Accountable the Employees.
 - Police officers couldn't do their jobs if their radar machine tracked average speed of all cars on the road.
 - Be attuned to distinguishing between a customer's satisfaction with a specific interaction and their loyalty to the overall relationship. (Might ask two questions: "Did we resolve all the problems you called about?" and "Would you recommend us to a friend or colleague?")
 - Be aware that teams frequently regroup and that customers often interact with multiple departments, like a patient at a hospital.
 - Hockey teams monitor goals for and against while each player is on the ice; hospitals could rank teams and individuals by the NPS that is the average of all patients served.
- Principle 6: Audit to Ensure Accuracy and Freedom from Bias
 - Sources of Bias:
 - Fear of retribution...when the surveyor (the vendor) has power over customers...make sure the process is confidential.
 - Bribery...witnessed at car dealers, where employees bribe customers to get good scores...again, confidentiality is key, as is education of employees.
 - Grade inflation...customers might feel awkward giving bad grades...use 3rd party survey vendors...keep customer names confidential, unless customer gives permission for release.
 - Fighting Bias
 - Use email wherever feasible
 - Make team or individual scores transparent to enable community policing
 - Use a 3rd party to collect feedback so customers can be completely candid and the promise of confidentiality is more credible
 - Educate employees and customers about the goals and ethics of the feedback process

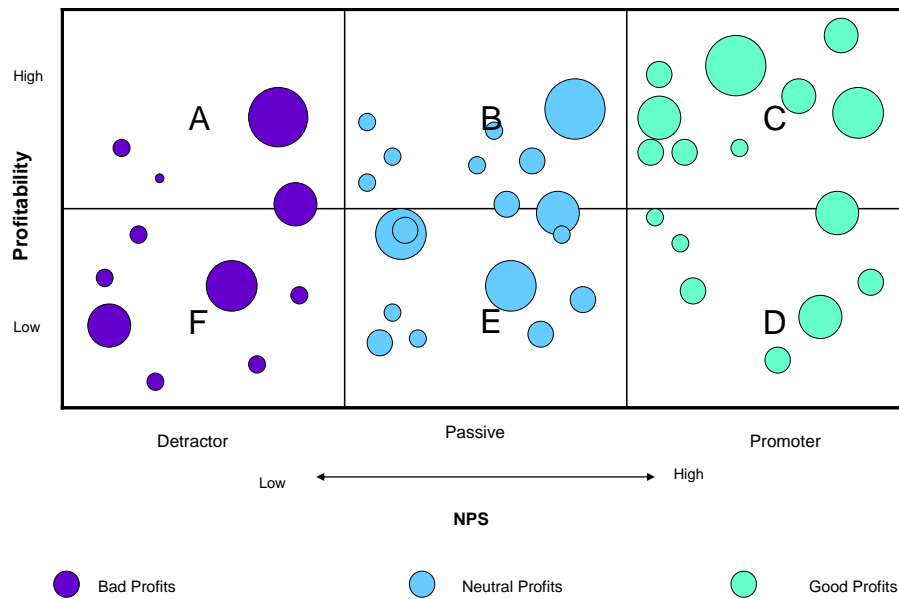
- Develop audit procedures that will uncover gaming
 - Consistency for Accuracy. Be consistent in your approach. One restaurant got very different results between surveying customers as they were leaving the restaurant versus surveying by email...they were more honest by email.
 - Principle 7: Validate That Scores Link to Behaviors
 - *“You must regularly validate the link between individual customer scores and customer behavior over time.”*
 - Be on the look out for customer surveys saying our relationship is great and then seeing customer defections. Means something’s wrong with your questions and/or process.
 - Footnotes to include in the presentation of information:
 - Response rates
 - Customer sample size and selection process
 - Inducement for participation, if any
 - Survey medium (face-to-face, telephone, email)
 - Degree of confidentiality
 - Granularity and frequency of reporting
 - Link to Employee Rewards
 - Gaming safeguards and sanctions
 - Audit procedures

Part Three – Becoming Good Enough To Grow

Chapter 7 – Design Winning Customer Strategies

- Bain did a survey of 362 companies.
 - 80% of senior executives said their company delivered a “superior experience” to their customers. >>> “Believers”
- Then Bain surveyed the customers of those same organizations.
 - Only 8% of the companies received a “superior experience” rating. >>> “Achievers”
- Reichheld recommends that companies focus on three steps in becoming an NPS achiever:
 - 1. Design value propositions that focus on the right customers.
 - 2. Deliver those propositions from end-to-end, across all departments.
 - 3. Develop the capability to renew and reinvent the experience over time.
- Defining the Reality of Your Customer Base

Separating good profits from bad with the customer grid



- Understand the realities of your customer base. Circle size is for revenue.

Sector	Priority	Strategy
C	1	Reinvest for value-added products, especially if you're earning excess profits
A	2	Talk to them – change systems. Phone companies have certain customers locked into contracts; pissing off customers but making money.
F	3	Up or out
D	4	Talk to them – be honest
B	5	Talk to them – figure out how to change to C
E	6	Figure out what kind of customer (Amex card holders who never spend...low profit and passive...offer different, more appropriate products)

- Designing Winning Propositions
 - Best way to find winning value proposition is to a) think about the end-to-end customer experience and b) focus on a profitable repeatable niche. HomeBanc focused on home purchasers rather than refinancers.
- Designing for Growth
 - Don't hide behind the excuse that your business is a commodity business. Look at what Enterprise has done in rent a cars and Southwest in airlines.

Chapter 8 – Deliver – Building An Organization That Creates PROMOTERS

- Your employees...are they PROMOTERS? A Bain study of employees working 10 or more years for their company showed that only 19% were PROMOTERS.

- “...the battle to convert customers into PROMOTERS can be won only if frontline employees are PROMOTERS themselves.”
- Send the Right Messages
 - If you tell your employees that all that counts is profits, they will rarely be PROMOTERS.
 - Dell has formed a “Customer Experience Council”
 - Superquinn, Irish grocery chain with high NPS ratings, has all his employees wearing boomerang pins, to remind them that customers come back repeatedly. A new manager at a Superquinn store thought he could cut costs by not baking bread as frequently and not having as much waste; the result was a less appealing atmosphere and lower sales.
- Hire (and Fire) to Inspire
 - To build promoters from within, you have to start with your hiring processes.
 - John Young, in charge of HR for the Four Seasons, on building a service culture, “*First, you must decide what you stand for, and then you must align every one of your systems to reinforce it. You recruit for it, you select for it, you orient for it, you train for it, you reward for it, you promote for it, and you terminate those that don’t have it.*”
 - Reichheld says, “*Too many companies do kid themselves about their commitment to the customer experience, let alone the Golden Rule. They tolerate great salespeople or great engineers who don’t embody the core values the company nominally espouses. That practice alone tells employees that the values are not the top priority.*”
- Pay Well and Invest in Training – So Employees Invest in Relationships
 - Example of Four Seasons training where they roleplay situations:
 - Boss who realizes that its unfair to other employees and customers to not terminate an employee who has received all the proper training but still fails to deliver.
 - Coworkers who realize that complaining to other people causes more problems versus simply speaking directly with the person with whom you have a problem.
 - “Does your main restaurant serve seafood?” Question launches training on how an employee can move beyond simply answering the question to surprising and delighting customers.
- Small Teams Enhance Accountability and Service.
 - Loyalty leaders have found that making small teams, typically 5-15 people, greatly enhances service and accountability.
- Link Measures and Rewards to Company Values
 - Be careful what you measure and what you reward for, because you’re likely to find people gaming your system.
 - Be careful of too many statistics and losing sight of the overall goal.
- Putting It All Together: USAA’s Call Centers.
 - USAA is an insurer of military personnel. Recognized for service and innovation.
 - USAA hires away from call-center experience.

- Minimal scripts for call-center employees.
- High training.
- Encourage employees to resolve all issues on the first call.

Chapter 9 – Develop A Community Of PROMOTERS – By Listening

- Hold Direct Conversations With Customers
 - CEO of Vanguard Group mans the customer phone lines 4 hours per month.
 - CEO of Intuit participates in “follow-me-homes,” where Intuit employees get permission to go to a customer’s home and observe them installing and using the company’s software.
 - CEO of Superquinn holds seminars with his customers...without his managers in attendance.
- Create Process for Systematic Listening by Frontline Employees.
 - SAS Institute, a maker of analytical software, allows its Customer Service Reps and customers to vote on where the company’s development budget will be spent.
 - Because of technology, many companies are able to encourage others (customers, developers) to improve their product...Linux, Google, Amazon.com.
- Let Customers Guide Innovation
 - Rapid Innovation at eBay.
 - Listen to customers and respond quickly.
 - Pink-liners, employees who facilitate exchange of messages on the site, are a key source of feedback from customers.
- Help Customers Delight One Another
 - New Yorker magazine organized a “homecoming event.” Spent \$1.5 million for artist showings, poetry readings, expert lectures, panel discussions, author breakfasts. Great appeal for PROMOTERS, ie core readers and staff members. (Reminded me of an event put on by Williams College in San Francisco recently where Williams paid for professors to come to a hotel and spend a day teaching alums.)
 - Amazon.com nurtures its creative community, especially book reviewers.
 - Adobe Studio Exchange, for key customers to exchange ideas.
 - Harley-Davidson facilitates HOGs (Harley Owners Groups).
 - The Lego Group facilitates new designs and product ideas from local clubs and exhibitions.
- Create an Inner Circle
 - Look at the language you are using in your surveys very carefully. PROMOTERS, passives and DETRACTORS should be asked tailored questions.
 - It is important to uncover the exact language that explains why a customer appreciates and promotes a particular company.
 - Intuit took its most unhappy customers and solicited their feedback.
- Bringing Traditional Customers Into the Circle

- Communispace Corporation offers a web-based product that creates a customer community for a company's end-users.
 - *"...having a roomful of target customers camped out in the corner conference room, always ready to comment on a new idea, evaluate new pricing or contribute create ideas."*
 - *"Companies become much more than vendors in the eyes of both customers and employees. They become the hub of a network of mutually beneficial relationships governed by a shared set of rules and ideals that connect with the very identify of their members."*

Chapter 10 – One Goal, One Number

- Growth: One Number for Better Customer Relationships
- Talent: One Number for Better Employee Relationships
 - Build from the Golden Rule; drive out cynicism
- Financial Rewards: One Number for Better Investor Relationships
 - Bain is now using NPS in the evaluation of acquisition targets
- One Number, Many Foes
 - NPS has its share of detractors...many entrenched interests
- The Accountability of a Community
 - There is a great power when a community gets behind something. When the community sees that 'rigorous oversight' is a good thing, they will participate and reinforce what the organization wants. Police departments see this effect.
 - Reichheld draws a correlation between the birth of democracy and the power of a community to focus itself towards any greater goal. Democracy encourages everyone to participate and, likewise, building a real community means that members care about that community and they participate in the 'rigorous oversight' of the values and mission of that community.
- The Big Picture
 - *"In an effort to keep this book short and focused, I have concentrated on for-profit businesses. It doesn't require much imagination to see the relevance of NPS to a much broader range of institutions. The best way for any community to grow is to attract the right kind of new members through word-of-mouth advertising, then ensure that members develop mutually valuable relationships worthy of an ongoing investment of their time and energy. This is the cycle that builds successful schools, charities, hospitals, associations, and foundations."*

Appendix A – The Linkage Between NPS And Growth

Appendix B – Winners And Sinners For Selected US and UK Industries