

A photograph of a modern building with multiple floors, each featuring a curved balcony with a white railing. The balconies are arranged in a way that creates a strong sense of depth and perspective, with the lines curving towards the right side of the frame. The building is light-colored, and the balconies are a contrasting white.

# **NPS Outcome Engineering: Momentum Methodology**

A comprehensive approach to achieving business  
impact from Customer Experience initiatives





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**“All happy families are alike;  
each unhappy family is unhappy in its own way.”**

TOLSTOY, ANNA KARENINA

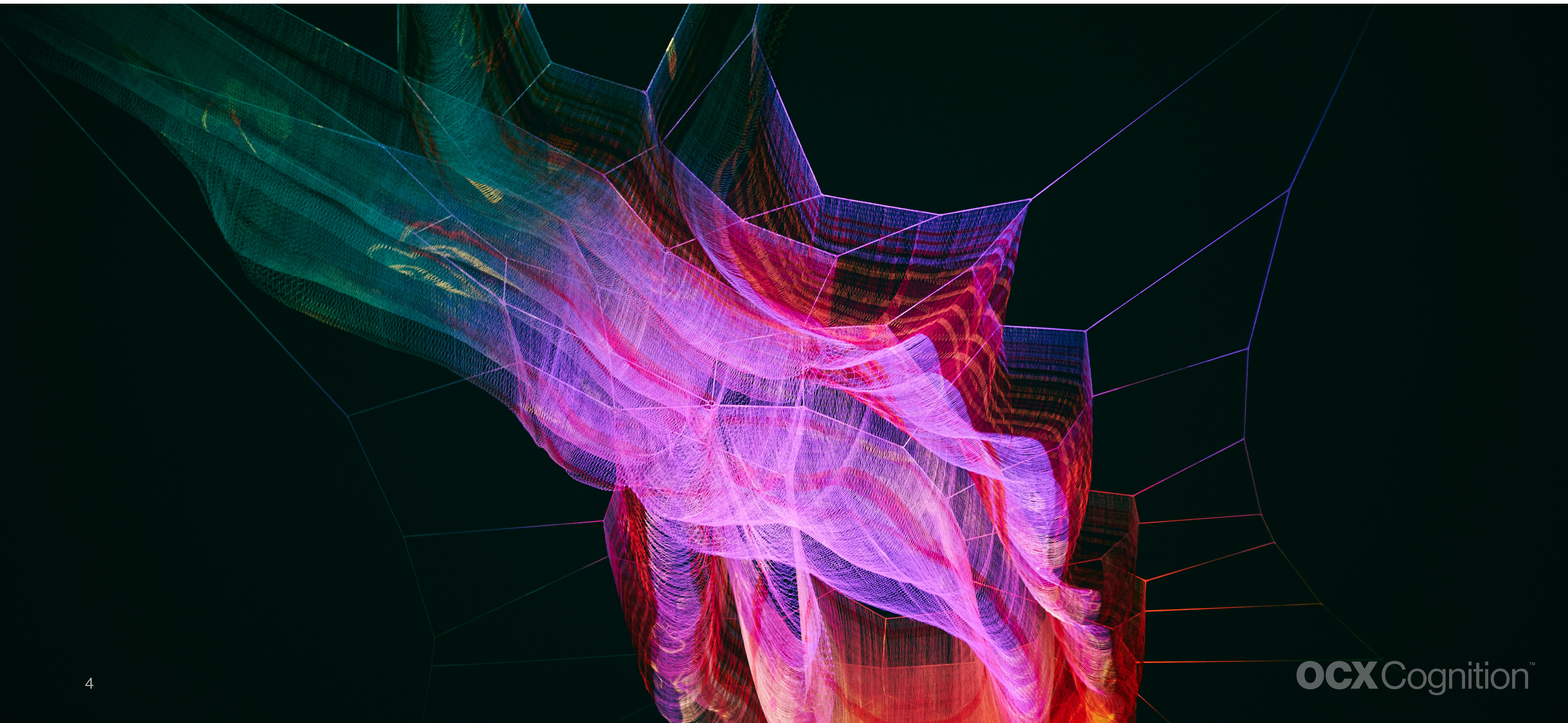
**All successful CX efforts are alike.  
Failing programs do so in their own way.**

**It is possible to codify success.**



**NPS Outcome Engineering** is a new way to plan and execute CX initiatives.

It takes the traditional “survey-centric” view of CX and inverts it with a “value chain” perspective, linking operational process and performance to CX metrics.





**Momentum** is our end to end process for CX Outcome Engineering.

Whether you are just starting your journey or a mature program that isn't delivering its full potential, Momentum provides the necessary foundation for achieving business outcomes.

We distilled lessons from over 1,000 enterprise implementations over 15 years into a comprehensive approach that we know works.

It's the only methodology developed by the team that co-created NPS in the first place.



# What is Momentum?

MOMENTUM is a programmatic approach to implementing and realizing the benefits from [NPS Outcome Engineering](#)

## **Defined process stages**

- Ensure the correct foundations are built for long term success and that critical elements are adequately developed and implemented
- Project management goals in terms of time, cost and quality are achieved
- Best practices are incorporated into each stage

## **Toolkits**

Digital, data driven tools that are applied to each stage ensuring that optimal solutions are found

## **Workshops**

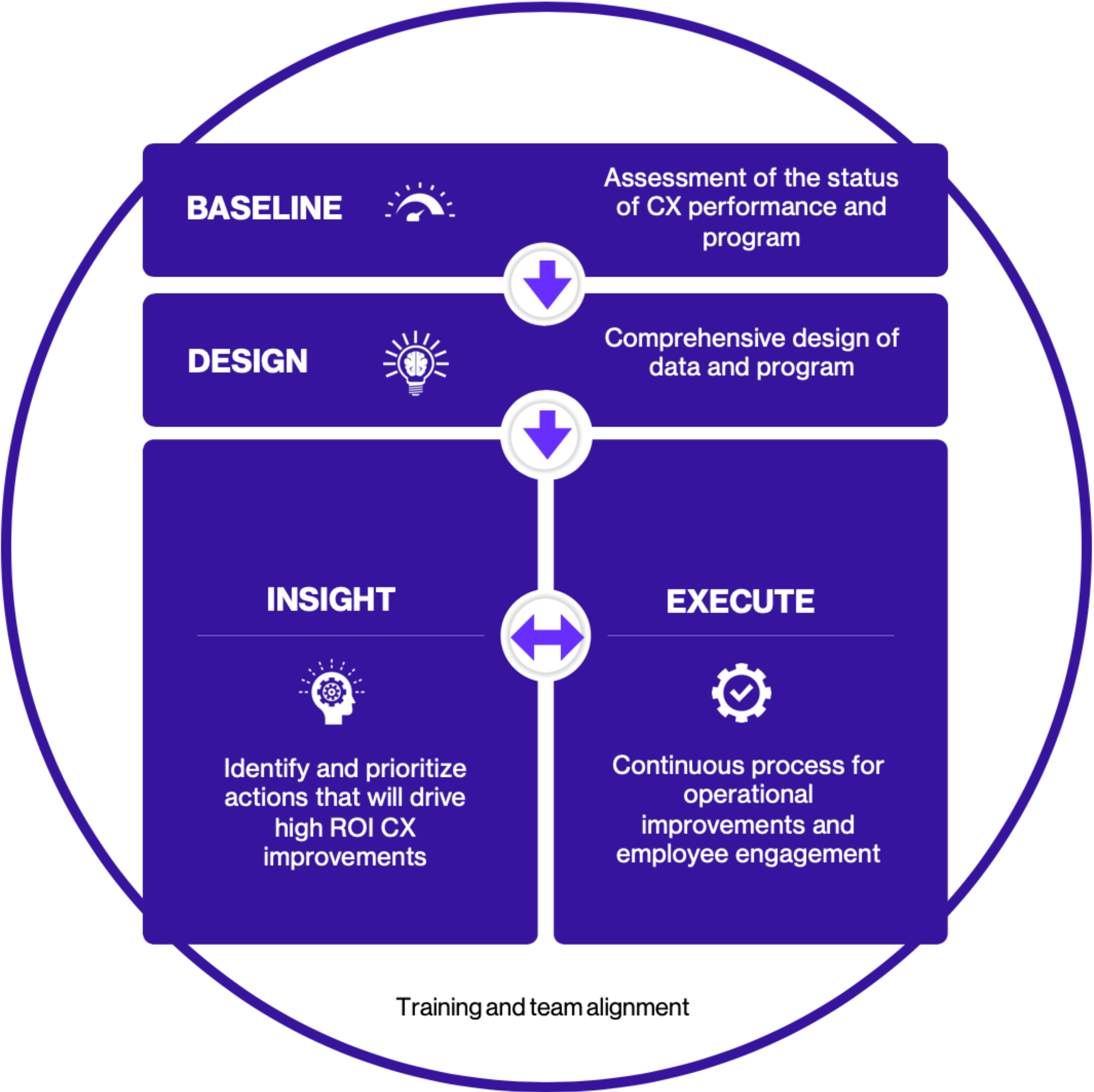
Collaborative exercises to build refine and achieve consensus around each process stage and action plans

## **Defined deliverables**

Documentation frameworks that support decision making, capture program elements for communication and organize ideas and data around best practices



# Momentum Process







Our baselining methodology has been developed over the years to provide a data driven, comprehensive assessment of the CX performance of the company. Momentum combines the most comprehensive baseline in the industry with the most comprehensive design process.

Design is at the heart of all CX initiative success. Now our methodology has evolved to follow the NPS Outcome Engineering approach – design for financial impact. But our design goes much further than just journey and survey design:

- Program roadmaps to chart capability building over multiple years.
- Operational data and key performance indicator designs, to support the next generation of NPS analytics
- Management accountability processes, such as compensation planning
- Program governance structures to build team capabilities and ensure quality ongoing execution
- Independent technology assessments to ensure you find and implement the appropriate tools across all elements of the program

**What makes our baseline and design so effective? Experience.**

The latest version of our design methodology builds on a combination of proven thought leadership and over a decade of experience with global enterprise programs. We literally wrote the book on CX program design.



# Baseline Elements







# Design Deliverables

**Program Roadmap**

Build a multi-year program roadmap for deployment of capabilities across the enterprise

**CX Metrics**

Select the right CX measurements and their correct use case

**Goals and Incentives**

Establish the right goal and accountability structure, review and recommend incentives

**Journey Design**

Model the customer touchpoints, by customer segment, based on measurable events with high likely impact on CX measures.

**Data/Survey Data**

Specify the correct relationship, transactional, reactive survey designs and customer segmentation data profiles and models. Create the questions, target groups, timing and logic flows.

**KPIs/Operational Data**

Map the KPIs and operational data requirements that will link to the CX design, identify the systems sources, formats and measurements used.

**Audience Requirements**

Identify the different data use cases across the business and the model for distribution, accountability and access to data.

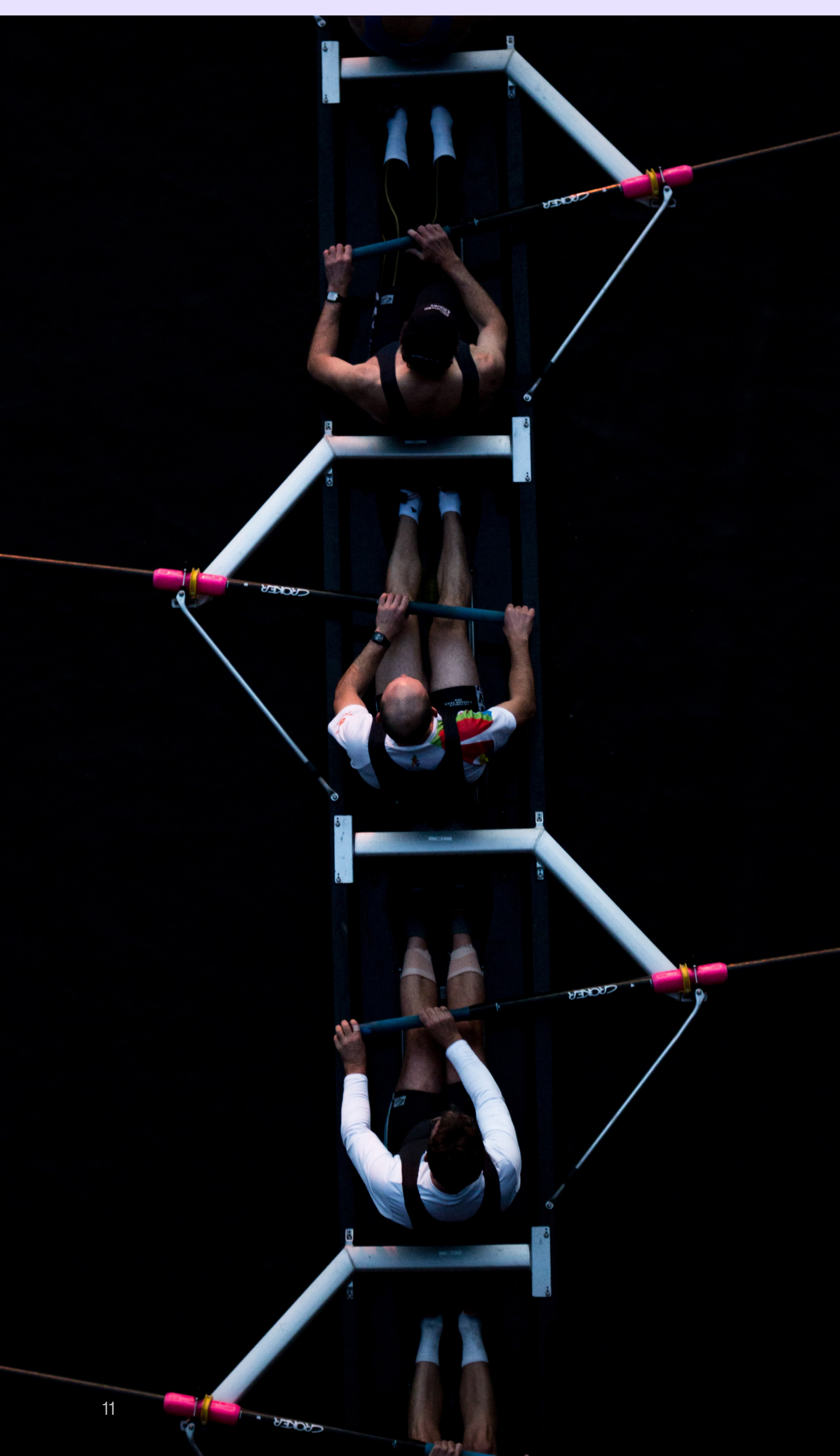
**Governance Structure and Organizational Capabilities**

Create a governance structure and accountability framework that meets the specific needs of the organization and its business model

**Technology Assessment**

Review existing technology assets for capabilities against functional requirements, cost/benefit and market performance.





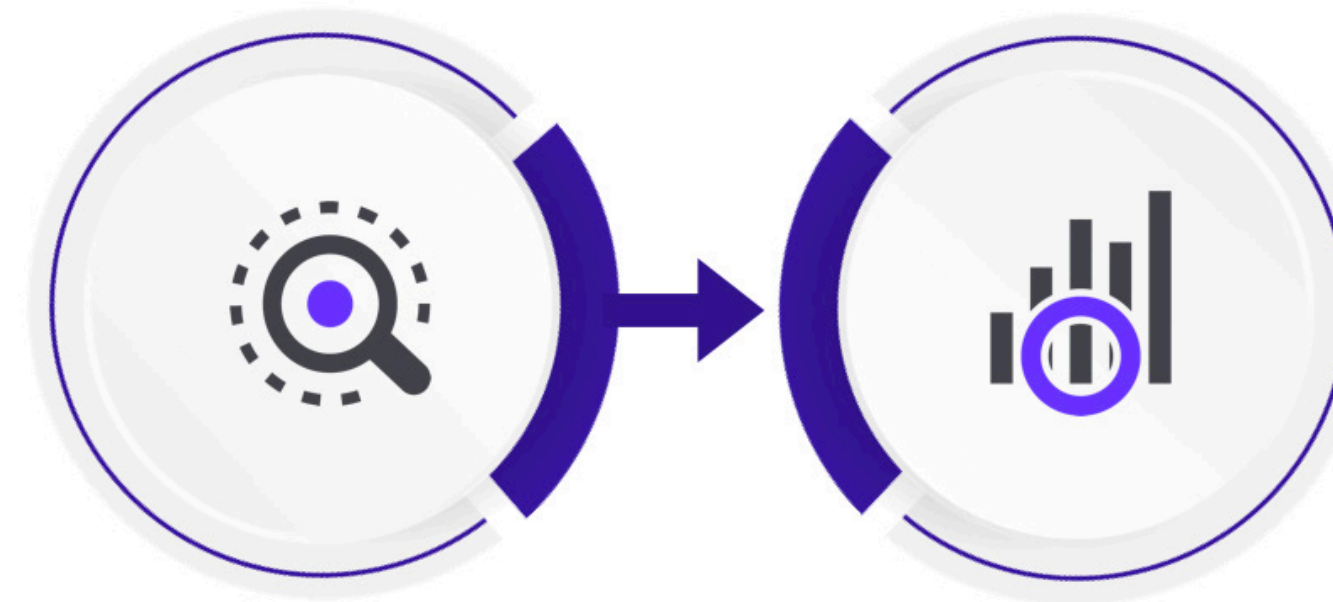
Insights and performance measurement are where the rubber hits the road for CX initiatives. Understanding true performance requires not just the right data, but also powerful metrics, algorithms and reporting which is where our unique and proven analytics really shine. Making the right decisions on how and where to invest in improvement, with high confidence in business outcomes, takes smart data modelling and interpretation. Momentum knits the right data design together with breakthrough analytics and communication tools to build leadership and organizational confidence in your CX direction.

### **What makes our insight so powerful? Innovation.**

From the creation of the original NPS methodology, to the future of NPS with machine learning based Spectrum NPS, we lead the marketing in finding signal in the data and tying it to business outcomes.



# Insights



## **Strategic Insights:**

Strategic CX Results Analysis and Review  
Priority-setting

## **Operational Linkage:**

Model the impact of KPI performance  
Goal setting and assignment of operational metrics

## **Predictive & Prescriptive Analytics:**

Predicted NPS score on customers, including  
non-respondents to surveys  
Identifying predicted levels of risk in your customer  
portfolio, based on current performance  
'What If' modelling to determine where  
to focus CX-led transformation efforts  
Economic impact analysis

## **CX Strategy (what should our strategy be?):**

Using insight to define customer experience strategy values  
Establishing the goals to achieve results  
Identifying the insights required to support existing  
strategy and investments

## **Calibrated Performance (how are you really performing):**

True performance against goals and competitive benchmarks  
Identifying how company performs against customer  
driven operational KPI's

## **Optimal Journey (where to invest to drive improvement):**

Touchpoint identification and optimization  
Goal seeking journey performance  
Outcome modelling

## **Portfolio Management (how to optimize resources):**

Tools to understand customer segment or client portfolio  
current, predicted performance, health and actions to improve



Many CX initiatives run out of ideas and energy when they get to driving and sustaining change across the organization. After all, the old CX model was invested in surveying, not operations and business change. Momentum inverts that thinking, putting ongoing change processes at the center of the methodology and building an enduring initiative to get to actual results.

You can't drive results without the right data and systems, and we are not just systems experts, we are independent experts. Naturally, we apply an analytic and programmatic approach to selecting and putting the right technology to work that meets the exact needs of the program. Without fear or favor.

But human systems really matter for long term success. From compensation strategies, to communication; from accountability techniques to the playbooks that the entire company will come to rely on, we cover all the bases.

And we don't just deliver reports, are team are with you all the way, to share the responsibility for performance.

### **What makes a great partnership?**

Accountability. We don't drop technology on you and leave you to figure it out. Nor will we build strategies we can't help execute. We are with you all the way.





# Execution





# **This is the future of NPS.**

**Dive deeper and stay up to date on CX. Explore all our current resources and get updates about new materials with a free subscription to Insights from OCX Cognition.**

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OCX Cognition delivers the future of NPS. The company implements CX programs that result in financial value through its revolutionary NPS Outcome Engineering approach. Drawing on more than 15 years of CX expertise and 1000+ CX initiatives, OCX Cognition ensures customer experience success with a combination of technology and data science powered by machine learning, programmatic consulting, and research-based CX insights and education. Learn more at [www.ocxcognition.com](https://www.ocxcognition.com).