CONCEPT

Measuring Customer Experience: NPS, CSAT and Customer Effort Score (CES)



Measuring Customer Experience: NPS, CSAT and Customer Effort Score (CES)

Technical depth: Practitioner · **Practical mode:** Modelling build

Introduction

Customer experience scores now appear on executive dashboards and in performance contracts, yet many are calculated inconsistently, drawn from samples too small to trust and read without knowing what drives them. Teams chase monthly movements that are statistical noise while real problems go unmeasured. This Core Concept course equips managers to calculate, test and interpret NPS, CSAT and Customer Effort Score correctly, link them to operational and financial outcomes, and set defensible targets. Participants work with sample datasets from several sectors and leave with a CX Measurement Framework and a working metrics dashboard.

Course Objectives

- Audit an organisation's existing CX metrics for consistent definitions, data sources and ownership
- Calculate NPS, CSAT and Customer Effort Score correctly and explain what each can and cannot show
- Determine sample sizes and test whether a change in score is statistically significant
- Identify the drivers of customer scores with key driver analysis and link them to operational data
- Set baselines, targets and control limits that resist gaming and reflect real performance
- Build a CX Measurement Framework and dashboard ready for executive reporting

Target Audience

- Customer experience managers responsible for CX metrics and reporting
- Customer insight and business intelligence analysts producing CX scores
- Service and contact centre managers whose performance is judged on customer scores
- Performance management and strategy office staff setting CX targets
- Marketing and product managers using satisfaction and loyalty data in decisions

Course Outline

Day 1: The CX Measurement Landscape

- CX Metric Taxonomy: Perception, Behavioural and Operational Measures
- ISO 9001 Clause 9.1.2 Customer Satisfaction Monitoring Requirement
- ISO 10004 Guidance on Monitoring and Measuring Customer Satisfaction
- Current-State Metrics Audit: Definitions, Owners and Data Sources
- CX Value Tree Linking Metrics to Revenue, Retention and Cost-to-Serve

Day 2: Metric Models and Methodologies

- Net Promoter Score Calculation, Categories and Known Limitations
- CSAT Scale Design and Top-Two-Box Scoring
- Customer Effort Score Agreement Scale and Effort Drivers
- American Customer Satisfaction Index Cause-and-Effect Model
- ISO 20252 Research Quality Requirements for Metric Surveys

Day 3: Calculating and Testing Scores

- Sample Size, Margin of Error and Confidence Interval Calculation
- Significance Testing for Score Movements Between Periods
- Key Driver Analysis with Correlation and Relative Importance Regression
- Weighting and Normalising Scores Across Channels and Segments
- Metric Definition Cards and Data Dictionary Build

Day 4: Targets, Linkage and Measurement Risk

- Score Gaming, Selection Bias and Goodhart's Law Controls
- Linking Survey Scores to First Contact Resolution, Repeat Contact and Churn
- Target Setting with Baselines, Benchmarks and Statistical Process Control Charts
- Customer Lifetime Value Linkage Model
- Balanced Scorecard Placement of CX Metrics for Executive Reporting

Day 5: Modelling Build and the CX Measurement Framework

- Telecoms Dataset Exercise: Rebuilding NPS and CES Trends
- Insurance Claims Dataset Exercise: Driver Model and Priority Matrix
- CX Metrics Dashboard Build in Excel or Power BI
- CX Measurement Framework Drafting with Metric Owners and Targets
- Peer Challenge Panel and Framework Defence

Skills You Will Gain

- CX Metric Design
- Survey Statistics
- Key Driver Analysis
- Score Significance Testing
- CX Target Setting
- Metric-to-Outcome Linkage
- CX Dashboard Development
- Measurement Bias Control

Why Attend This Course

- Return to work with a CX Measurement Framework and a working dashboard built on realistic data
- Tell executives with confidence whether this month's score change is real or noise
- Show which operational drivers move customer scores, so improvement budgets go where they count
- Compare measurement practices with analysts and managers from other sectors and countries

Conclusion

A customer score is useful only when it is calculated consistently, read with its margin of error and tied to the drivers and outcomes it is meant to represent. This course moves from auditing current metrics, through the NPS, CSAT, CES and ACSI models, to the statistics, driver analysis and target-setting controls that make scores trustworthy. The final day turns that material into a CX Measurement Framework and dashboard that participants take back to their organisation as a defensible basis for reporting and decisions.