



# Customer Survey Results 2013

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1. Short, online quantitative survey (a record 116 responses) backed up by 12 in-depth interviews.
2. ELEXON has sustained a consistently high level of satisfaction over the past five years and perceived value for money has reached a new peak level.
3. This success is built primarily on two key strengths: the strong administration of the BSC itself; and the professionalism, helpfulness and expertise of people at a day-to-day level.
4. Customers compare ELEXON favourably with other organisations they deal with within the industry.

5. The comprehensive range of communication channels adds to the 'people' side of ELEXON with access to detailed information & documents.
6. However, improvements are needed in terms of simplifying language across all channels and improving the website's structure and search facility.
7. Customers vary according to the size of their organisation and their role within it. Customers in more strategic roles within larger organisations are not as content as their more operational counterparts in terms of how ELEXON has conducted itself recently at an industry level.

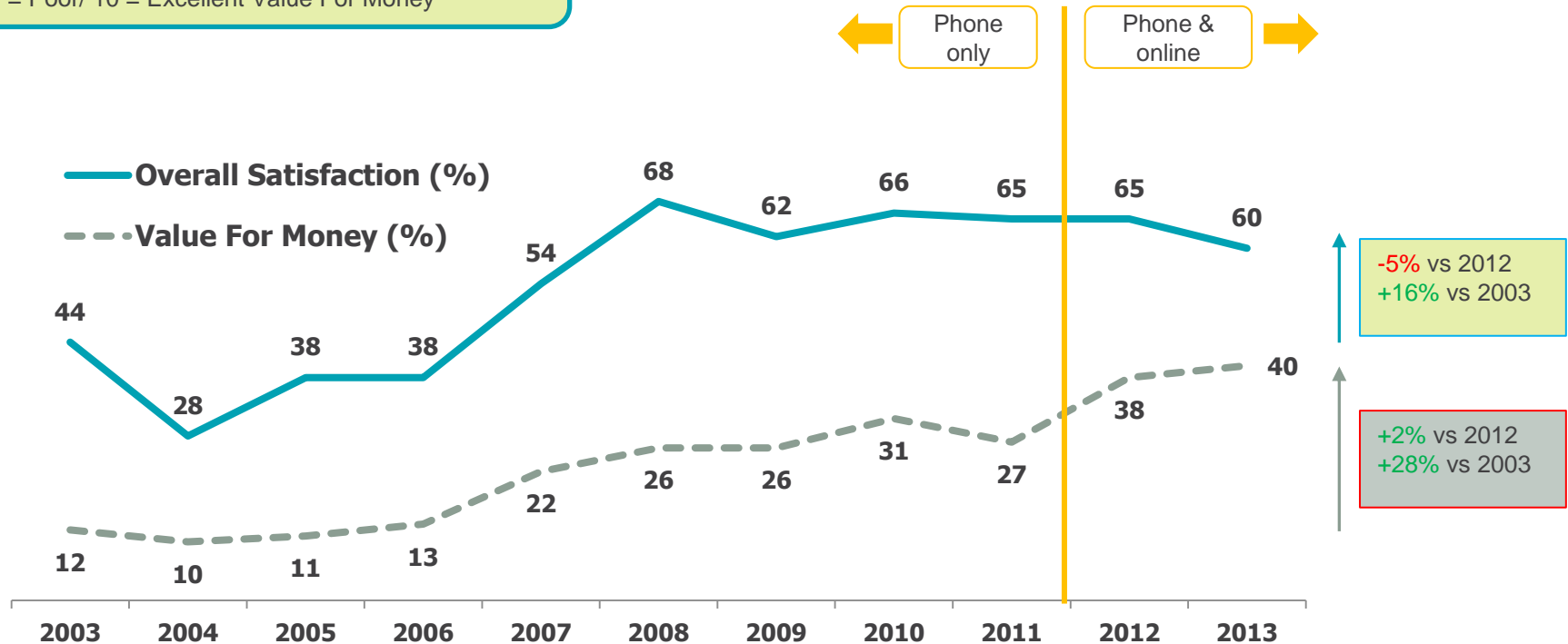
8. Trust has been undermined by a lack of openness and perceived self-interest. In particular, strategic experts are not convinced that ELEXON has been acting in the best interests of the industry or their organisation in the past year. Comments particularly driven by reaction to ELEXON's DCC bid.
9. Businesses face many challenges, but none concerns them more than smart metering. They feel ELEXON needs to use its expertise for the good of the industry, as long as it does not take its eye off the ball in administering the BSC.

# Overall satisfaction & value for money (score 8+ out of 10)

SCORE 8+ (Out of 10)

1 = Not At All Satisfied/ 10 = Extremely Satisfied

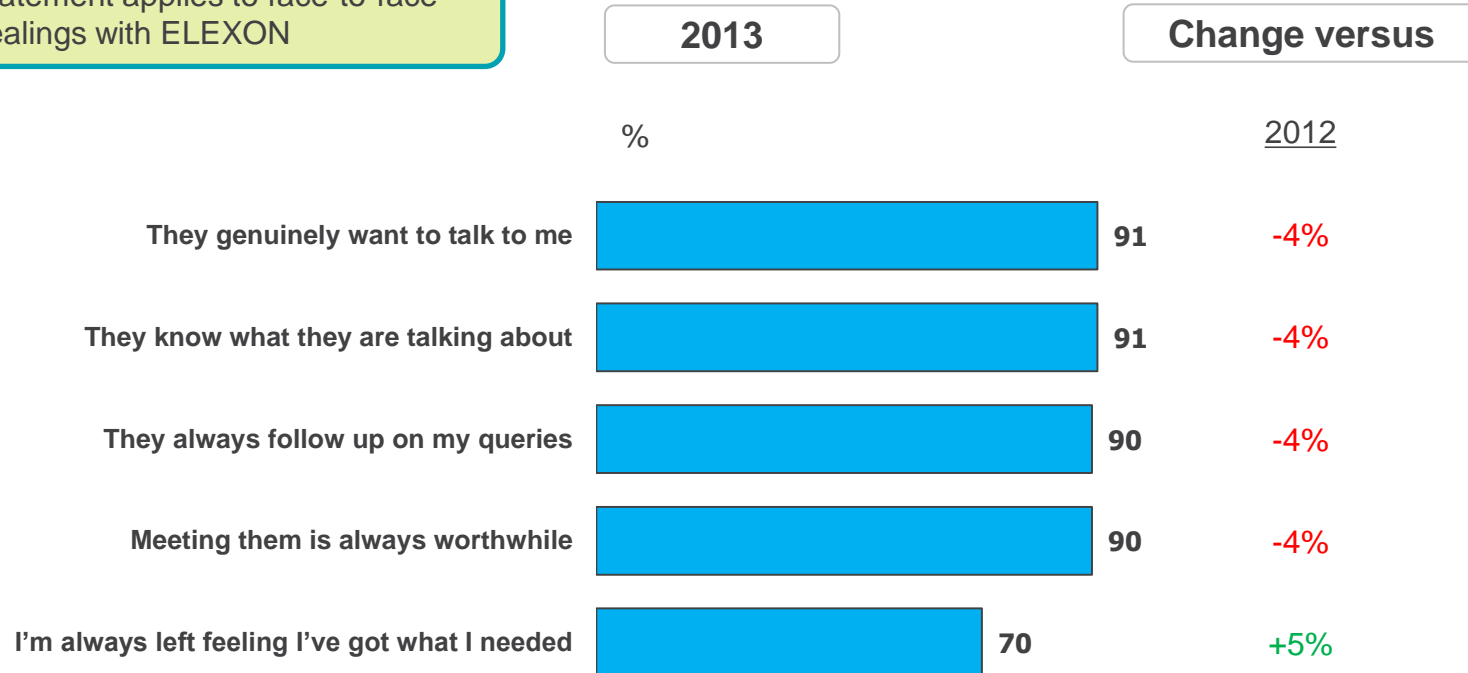
1 = Poor/ 10 = Excellent Value For Money



Value for money has reached a new peak level and we have seen minimal change (not statistically significant) in overall satisfaction in five years.

# Impressions of ELEXON's people

Statement applies to face-to-face dealings with ELEXON



Once again, almost all customers have positive impressions of ELEXON's staff, with no real change in the scores received for any aspect.

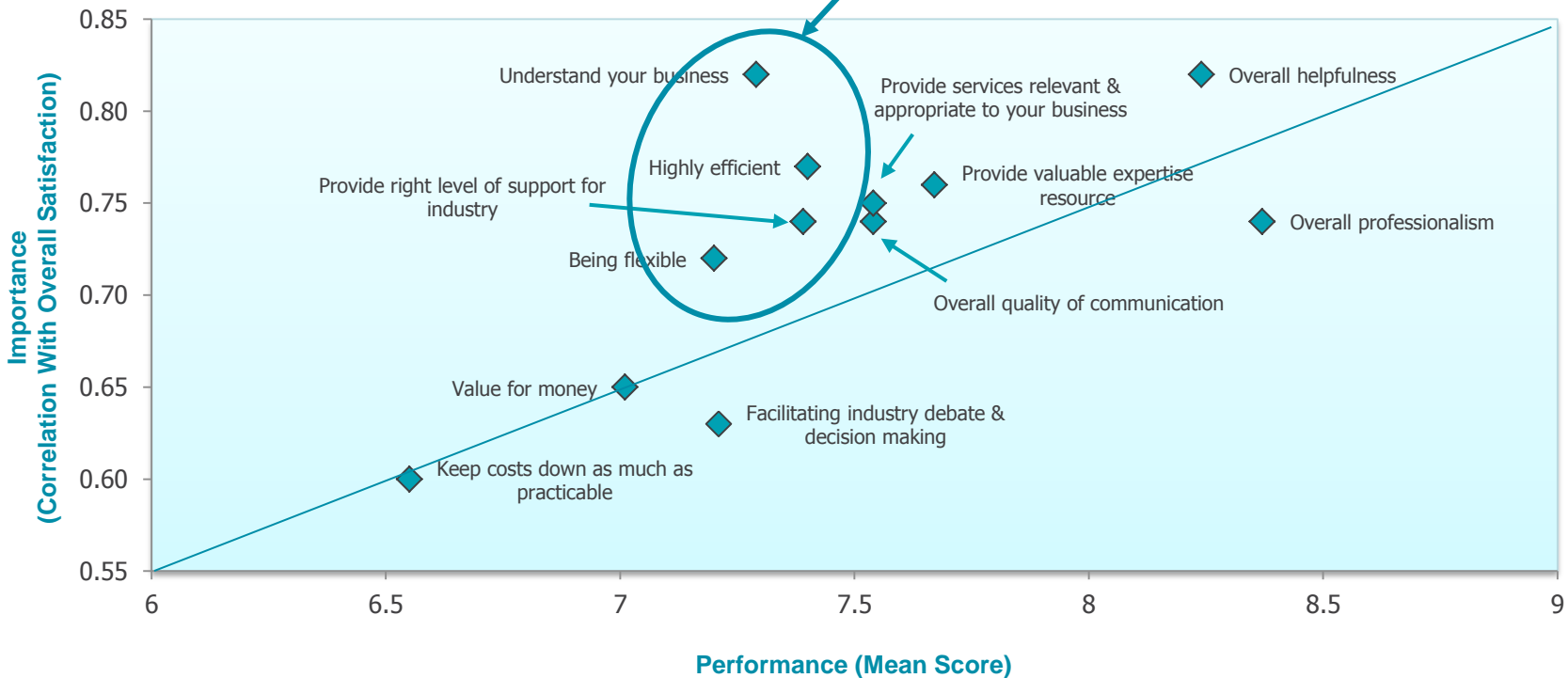
Base: Total Sample 2013/ 2012 (116/ 79)



# Satisfaction drivers and detractors

Total sample

Areas where it is relatively important for ELEXON to work harder



ELEXON's strengths of professionalism & helpfulness are key in driving satisfaction. Where ELEXON can focus to meet customer needs better is in terms of understanding their business, being highly efficient, and providing the right level of support to the industry.

# Summary of findings – by customer type

Four typologies exist, each with differing needs determined by the nature of their role & company size.

	Small & Stretched	Operational Specialist	Functional Leaders	Strategic Experts
Typical roles	Main contact (often contract managers) in smaller companies where settlement is one of many hats worn.	Day-to-day data processing (collecting, aggregating, submitting)	Settlement performance management & reporting. Often team leaders.	Senior compliance or regulation roles.
Involvement with ELEXON				
Key needs from ELEXON	Understand the BSC Clear communication Enforcer Critical friend	Clear communication Clear reporting (Commercial industry appreciation)	Enforcer Clear reporting Clear communication	Understand <u>my</u> business Critical friend Commercial industry appreciation
Satisfaction with ELEXON				
Main areas of improvement desired	Make it easier for them to grasp what they need to know about the BSC.	Want responsive, accurate and timely communication on routine day to day tasks	Help resolving outstanding audit issues	<b>Not pursuing own agenda. Increase openness and proactivity.</b>



# Comparative ratings (score 8+ out of 10)

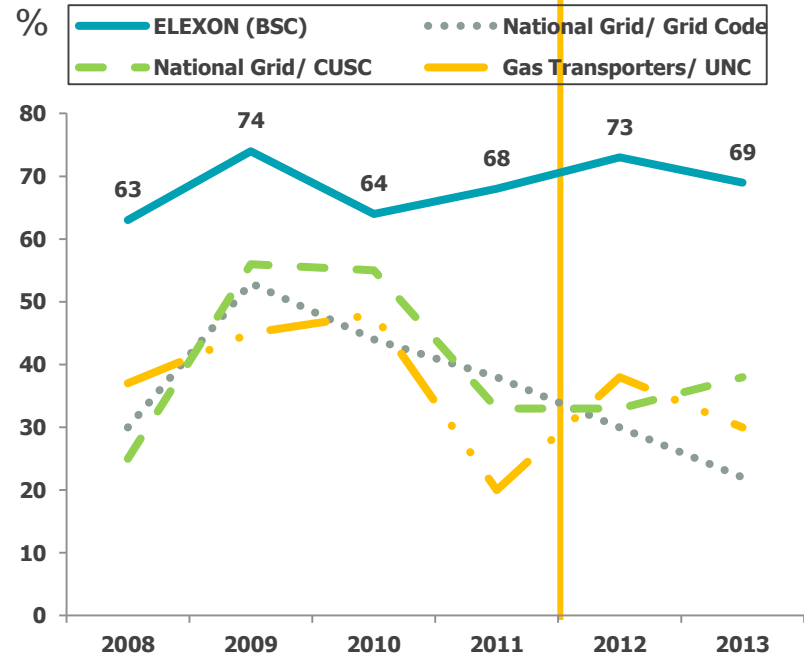
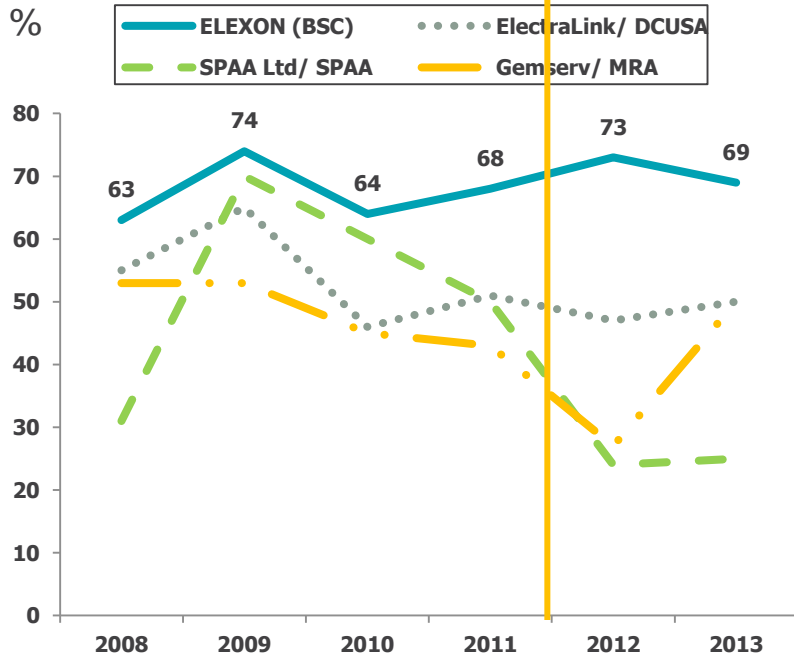
SCORE 8+ (Out of 10)  
1 = Poor/ 10 = Excellent

Phone only

Phone & online

Phone only

Phone & online



2013 Base Sizes

ELEXON (BSC) (116)  
Electralink/ DCUSA (54)  
SPAA Ltd/ SPAA \*(24)  
Gemserv/ MRA (66)

ELEXON (BSC) (116)  
National Grid/ Grid Code \*(36)  
National Grid/ CUSC \*(32)  
Gas Transporters/ UNC \*(23)



## Key themes and actions

1. Customer engagement – all customers have their own needs and experiences. Understand these in order to act appropriately and develop strong customer relationships.
2. Independent role – listen to all sides, facilitate debate, focus on the interests of the industry, not ELEXON or certain customers.
3. Transparency – when putting forward proposals/ELEXON points of view be transparent about reasons & arguments to avoid creating distrust.
4. Flexibility – Consult customers before setting deadlines in order to agree timescales that are realistic for all parties.
5. Website – improve search facility and review home page content & structure to facilitate more intuitive navigation .
6. Written communication – ensure all forms of written communication are accessible to the non-expert – plain speaking, concise, summarising, not over-complicated. Each has his/her own needs.