



ElectraLink Customer Research Report 2017





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This year's results show that customers are deeply engaged with ElectraLink and expect a high standard across all services. There has been a successive increase in satisfaction with the DTS and the value it offers, and customers are looking for more services from the Governance team.

Over the last 12 months the Governance team has doubled in size to meet growing demand from their customers and, as it has grown, some customers have experienced inconsistency in service which impacted the overall satisfaction score. Despite this, SPAA and DCUSA are considered by customers to be the second and third highest performing codes in the market, with only BSC outperforming them. The Governance team is investing in new helpdesk technology and has hired more industry experts and experienced code managers to lead on improvement of ElectraLink's service provision. It is expected that these changes will have a direct positive impact on their scores in years to come.

Having experienced this same dip in satisfaction a couple of years ago, the DTS has taken customer feedback on board and invested in engagement and improvements to the service technology and user access. This year they are launching a number of new features including a refresh of their web tools suite and investment in a number of innovative technology projects that will accompany a re-procurement of the DTS. Previous years' investments are reflected in this year's customer satisfaction and value scores and we expect this trend to continue. Satisfaction with the service has increased by 8% to 83% giving a score of 8-10 and value has increased by 18% to 61%. Moving forward, customers are expecting continued proactivity from the DTS.

Introduction

For the last twenty years ElectraLink has commissioned independent customer satisfaction research. This research helps inform ElectraLink as to how it can better meet the needs of its customers.

In recent years the research has informed ElectraLink's Customer Engagement Strategy including a number of service improvements across the business.

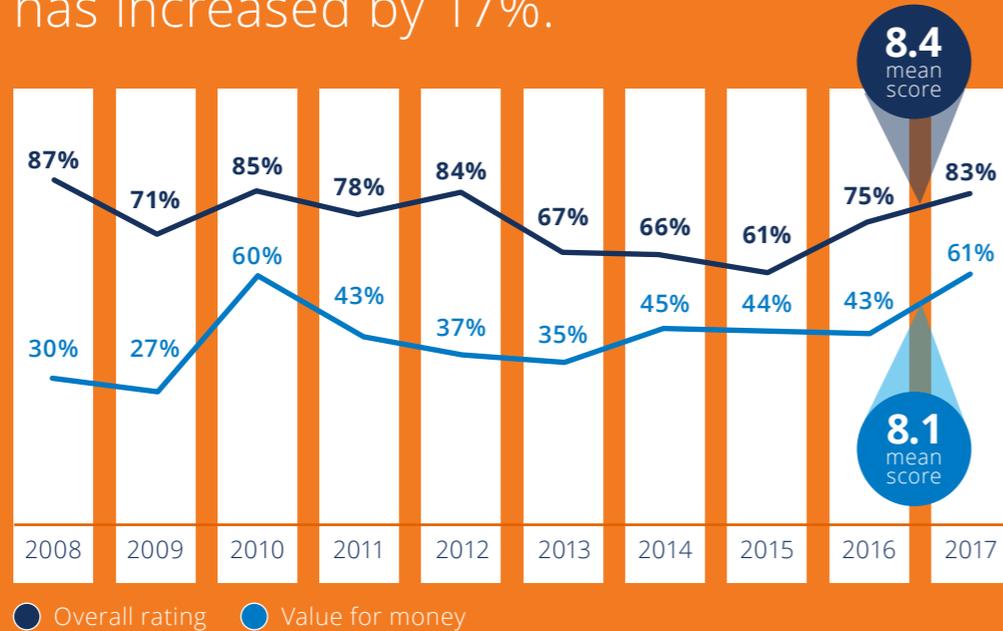
The research also primes ElectraLink on what customers value and how it is performing in these areas.



DTS Customer Research

Key measures

Since 2015, **overall satisfaction** with the DTS has increased by 22% and satisfaction with **value for money** has increased by 17%.



“Because if I think just about the last 12 months, the DTS standard services we have been using have been excellent.”
Satisfaction high 8-10 scores

Satisfaction with value for money

“I’ve had no issues with it and it’s been really good. It’s a system that does what it says on the tin and you can’t get better than that.”
Satisfaction high 8-10 scores

Overall satisfaction

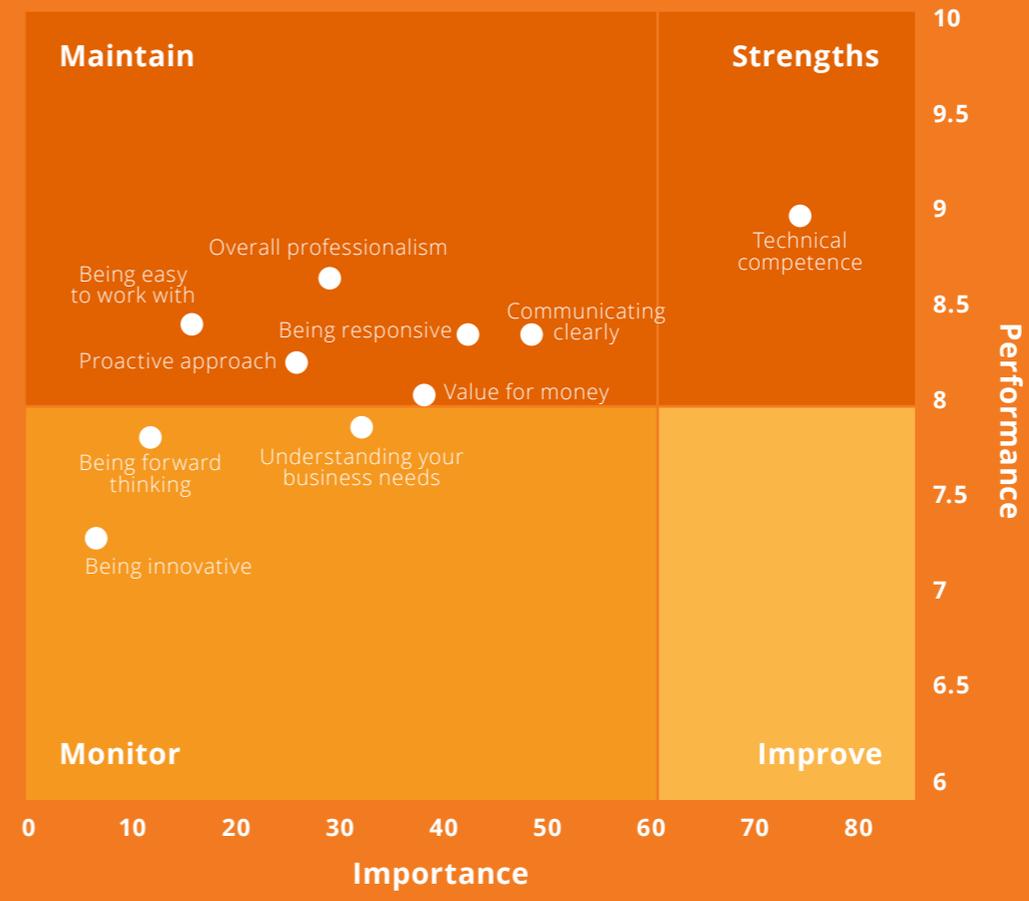
“I think that there’s more they can do... In an industry always being criticised for its high costs, I think Electralink has a pivotal role in developing strategies to help energy companies bring their prices down.”
Satisfaction low 1-5 scores

“I have had no problems, but equally I haven’t had to interact with them and I have not had anyone shouting at me that they are the best thing since sliced bread.”
Satisfaction low 1-5 scores

Key performance measures

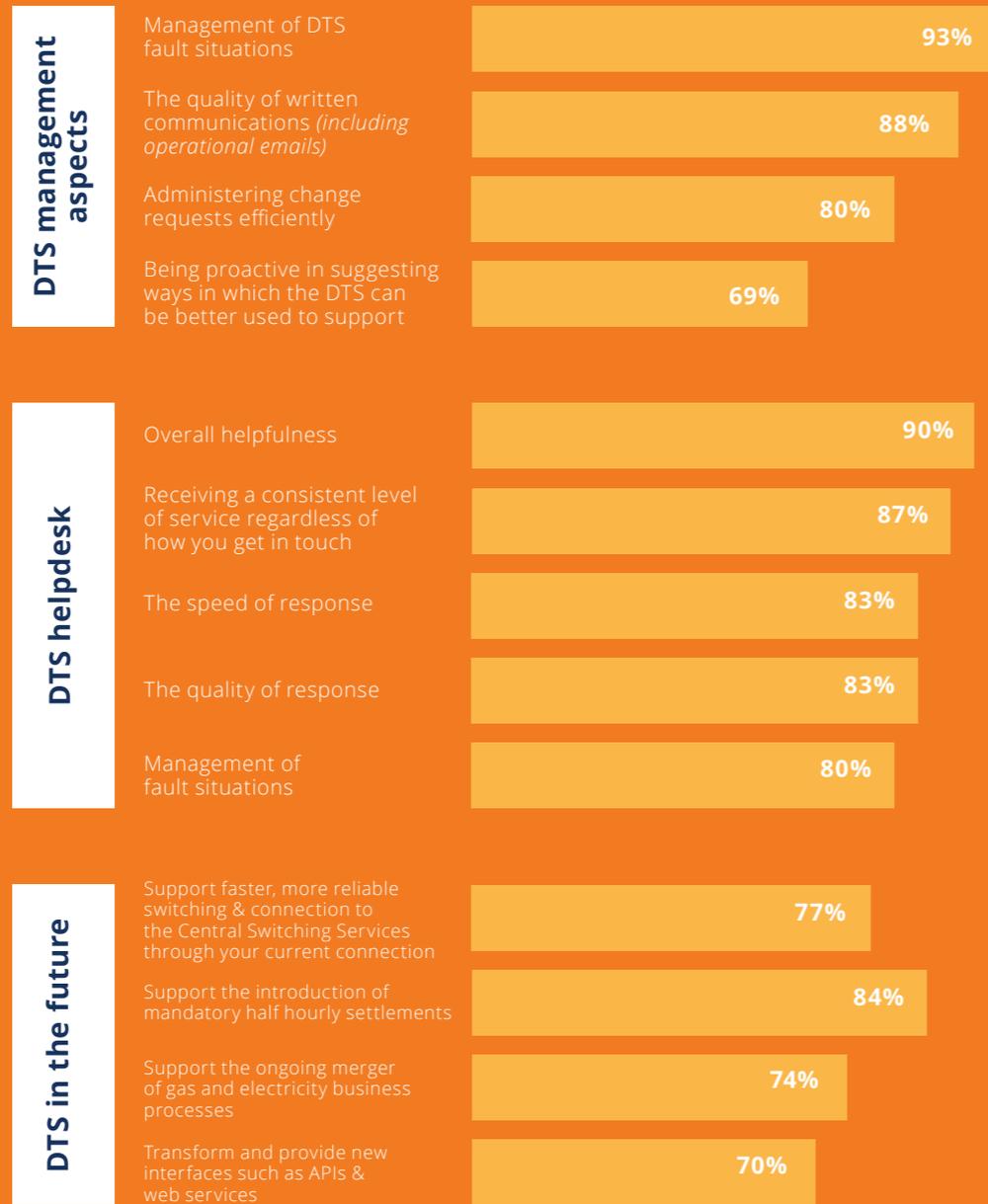
Technical competence is of most importance to customers and is also the service area where ElectraLink is perceived to be performing at the highest level.

There has been an improvement in the performance rating of technical competence and seven other performance measures since 2016, with the final two remaining static. In relative terms, innovation and forward thinking are less important to customers whose priorities are business as usual. However, ElectraLink will continue to push innovative solutions to market problems.



Satisfaction with the services provided by the DTS

Satisfaction levels are high with the services provided by the DTS.



Net satisfaction: 4-5 out of 5.

Network service awareness & usage

Awareness levels are highest for the Commercial DTS gateway (72%), DUoS e-billing (70%) and RUG site to site connections (61%).

Usage levels are highest for DuoS e-billing (48%). Awareness levels are lower for the Support portal (launched in April), File Cloner, Energy Market Insights and Check-it.

Reports	Aware of & use	Aware of/ Don't use	Not aware/ Don't use	Don't know
Energy Market Insights	4%	31%	61%	4%
File Cloner	6%	28%	63%	3%
DUoS e-billing	22%	48%	22%	8%
Check-it	0%	30%	67%	3%
RGMA or bespoke messaging	17%	35%	44%	4%
RUG site-to-site connections	31%	30%	33%	6%
Commercial DTS gateway	44%	28%	24%	4%
Support portal	6%	26%	69%	

Moving forward

High level of overall satisfaction with DTS

DTS must work hard to maintain the current high standards and customer satisfaction. Frequency of outages is low and timely resolution of issues when they occur is key to meeting customers needs and expectations.

DTS is good value for money

Customer communications regarding improvements and service offered has been effective. The DTS should continue to engage and feedback to customers in this manner to give a full understanding of the service provided.

Low awareness of some network services

Customers should be made aware of all the network services that are available to make full use of the DTS and encourage them to see EL as innovative. In particular Energy Market Insights are of interest and information is often sourced elsewhere.

Half are not using any reporting tools

Raise awareness re: reporting tools available and review with customers the MI they could utilise that would be beneficial. The types of report offered could be reviewed and rationalised.

Support portal awareness is low

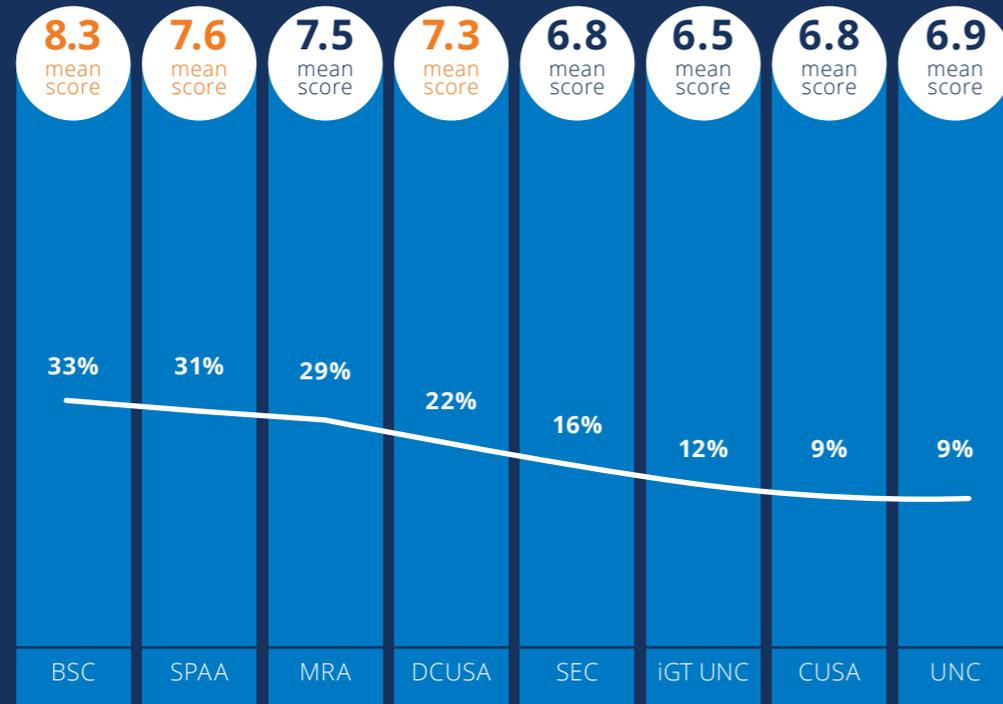
This is a new service that should now be rolled out and promoted to all customers to raise awareness and encourage use (where relevant). Examples of when it could be useful should be communicated to customers.

Governance Services Customer Research



Performance of key industry codes

SPAA and DCUSA perform well by comparison to other codes with only BSC scoring higher than SPAA.



Key measures

Overall satisfaction

SCORE 8+ (out of 10), where 1 = Not at all satisfied & 10 = Extremely satisfied.

2017 **43%**
*45% (exclude DK)

Change vs. 2016

-13

Value for money

SCORE 8+ (out of 10), where 1 = Not at all satisfied & 10 = Extremely satisfied.

2017 **34%**
*54% (exclude DK)

Change vs. 2016

-7

“ The overall service provided by ElectraLink is value for money and it would be very difficult to find a similar service from another provider.

Satisfaction high 8-10 scores

Satisfaction with value for money

“ Because of their professionalism, they are extremely thorough and they are pretty efficient as well.

Satisfaction high 8-10 scores

Overall satisfaction

“ I do know that I am (and have a number of times) picking up issues which I would have expected the secretariat to have already noticed.

Satisfaction low 1-5 scores

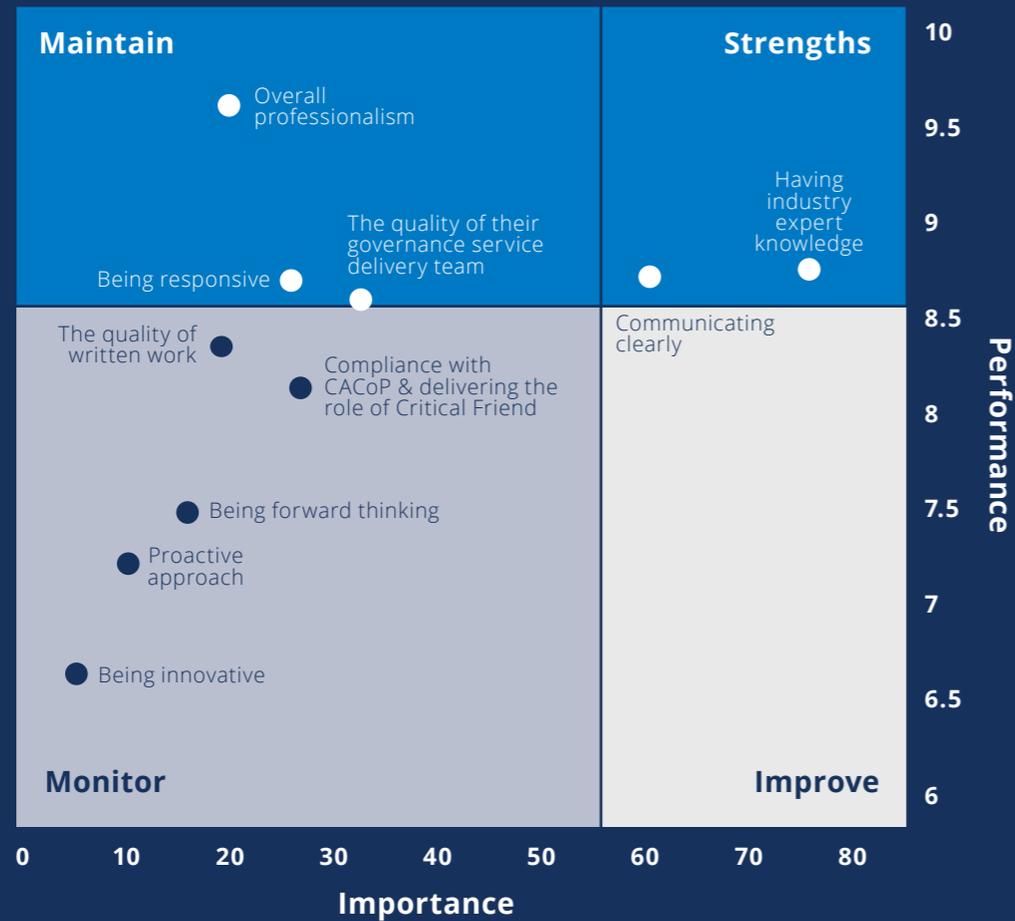
“ Sometimes a good experience, sometimes a very poor experience. Very hit and miss, dependent on who deals with your query/work group etc.

Satisfaction low 1-5 scores

Key performance measures

Having industry expert knowledge is of most importance to customers, followed by communicating clearly.

Since 2016, scores have remained static or slightly improved in these areas. However, there have been decreases for responsiveness and the quality of the governance service delivery team, a reflection of the rapid growth the team has experienced this year? Despite this, levels of professionalism are still perceived to be high. In relative terms, innovation and forward thinking are less important to customers whose priorities tend to be business as usual. However, ElectraLink will continue to push innovative solutions to market problems.



Whilst satisfaction with the team's management of customers' main codes remains high, there has been a dip in satisfaction with the helpdesk, with responsiveness and the quality of responses highlighted again.



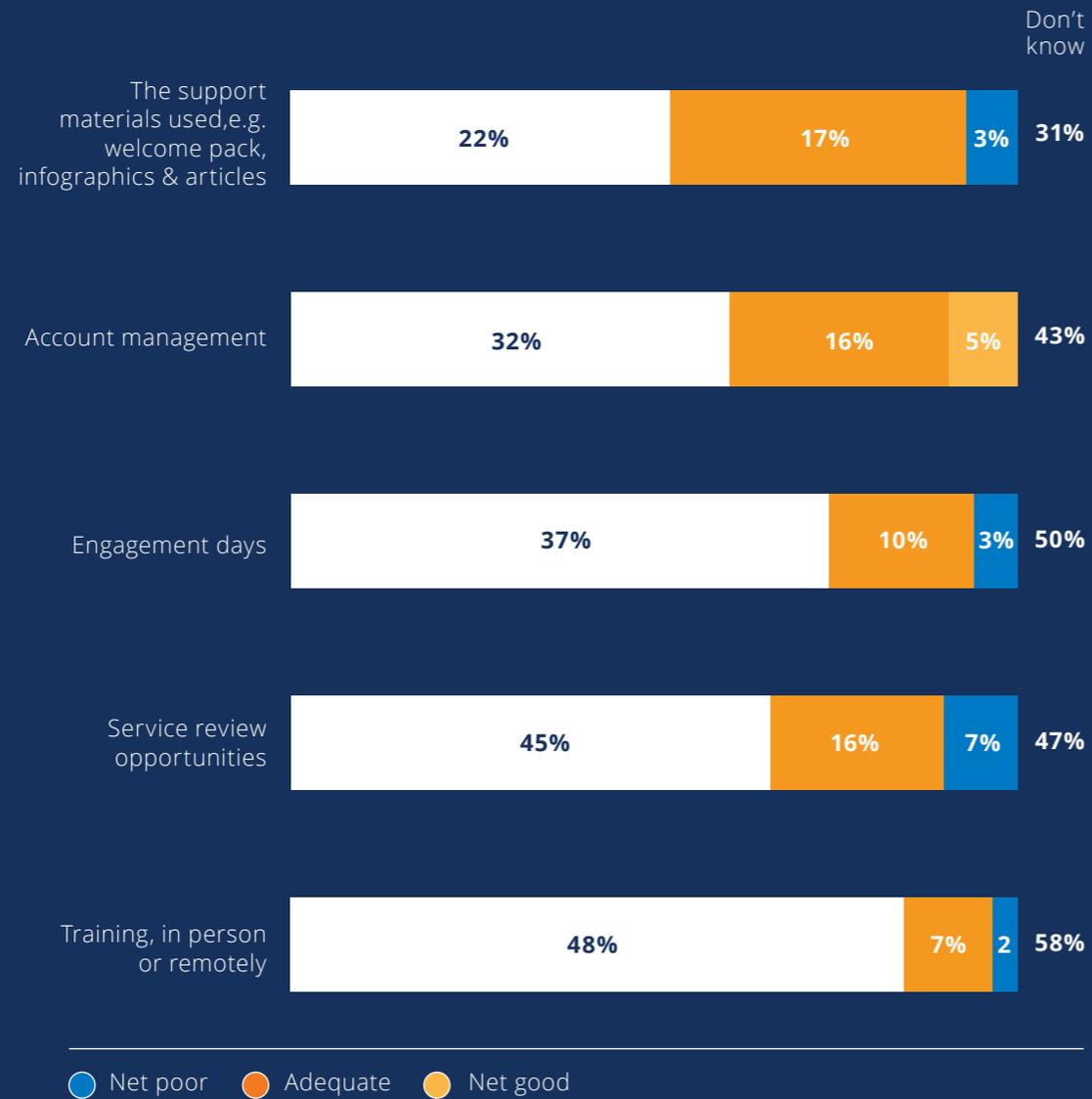
Net satisfaction 2017: 4-5 out of 5.



Satisfaction with the services provided by the Governance team

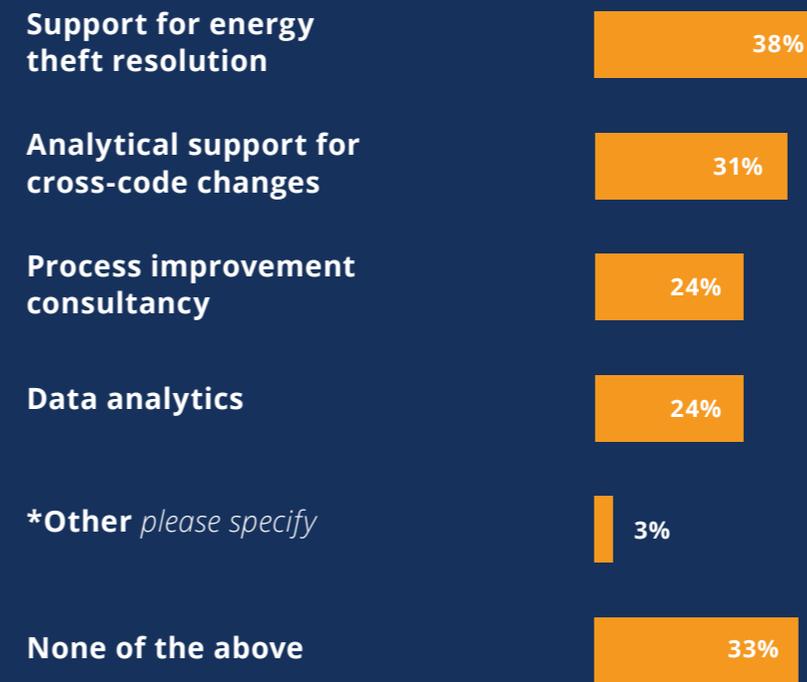
Customer engagement & communications

The support materials used and the introduction of account management to the team structure have been well received.



Interest in additional services

Two thirds are interested in additional services and there is interest across the board for services mentioned, particularly in support for energy theft resolution.



None of the above



*Other: AQ & Read Flows & Processes and a Data Flow Platform with a time-line (end to end process) for smaller users.

Moving forward

Over the last 12 months, the Governance team has doubled in size to accommodate a growing marketplace and Account Management has been introduced into the team structure.

This year's customer satisfaction scores have taken a dip, with responsiveness and the quality of the team mentioned as areas for improvement. This is something the Governance team is already addressing. There is a robust plan in place which addresses the areas highlighted in the research and there are signs that things are already starting to improve:

“

Since a number of members of staff left a number of months ago, the quality of the service got really quite bad quite quickly.

It is now improving and some of the new staff members have made a really difference. But there is still a long way to go (and this is likely to take time to learn) in order to get back to how good it was say 12 months ago.

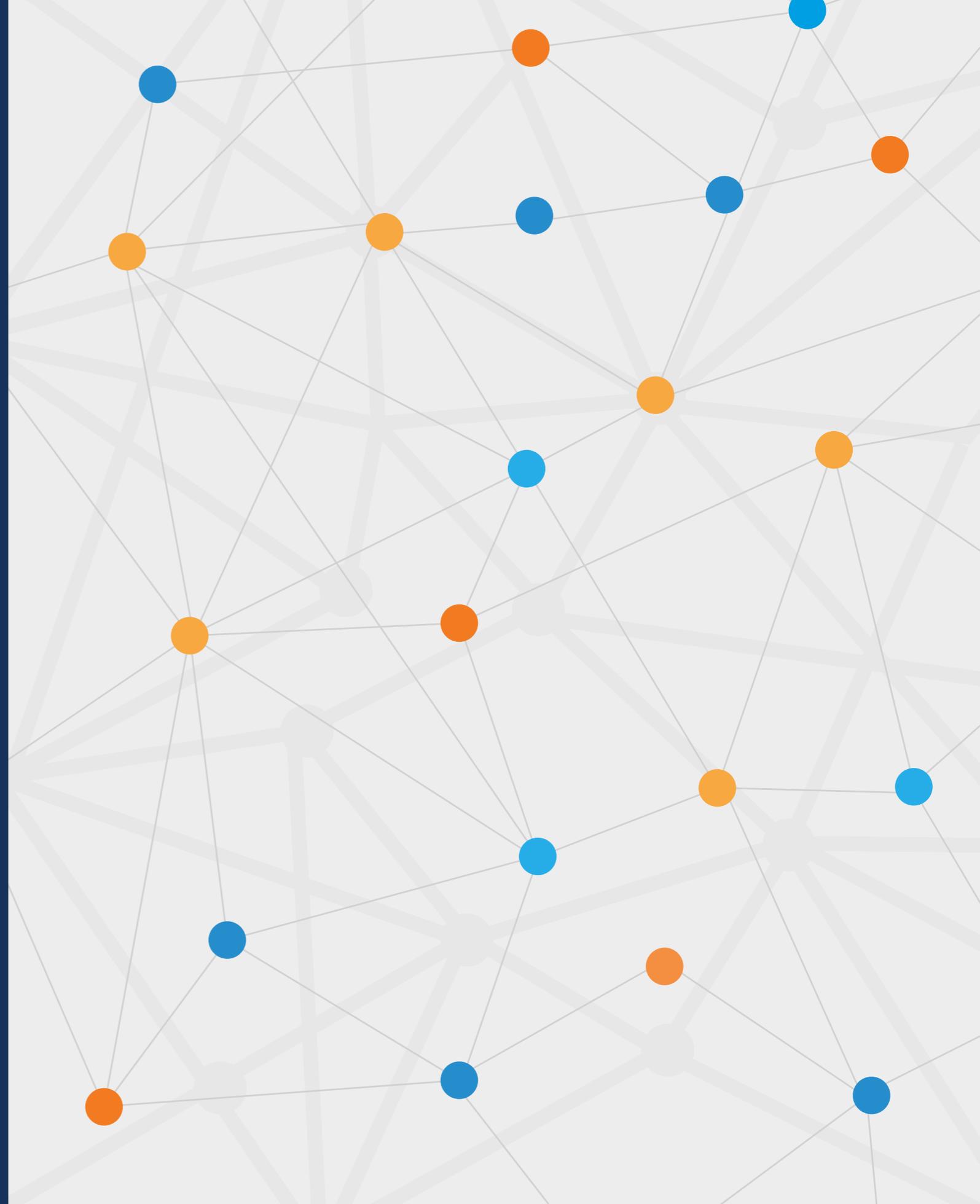
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“

In terms of the user groups I have been involved in, there's been improvement especially in the quality of the information and the level of expertise applied within these user groups.

”

Whilst the team's focus will be ensuring the basic service is delivered to the highest standard, Governance Services will also ensure that it continues to innovate and anticipate the needs of its customers, through the introduction of some additional services.





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