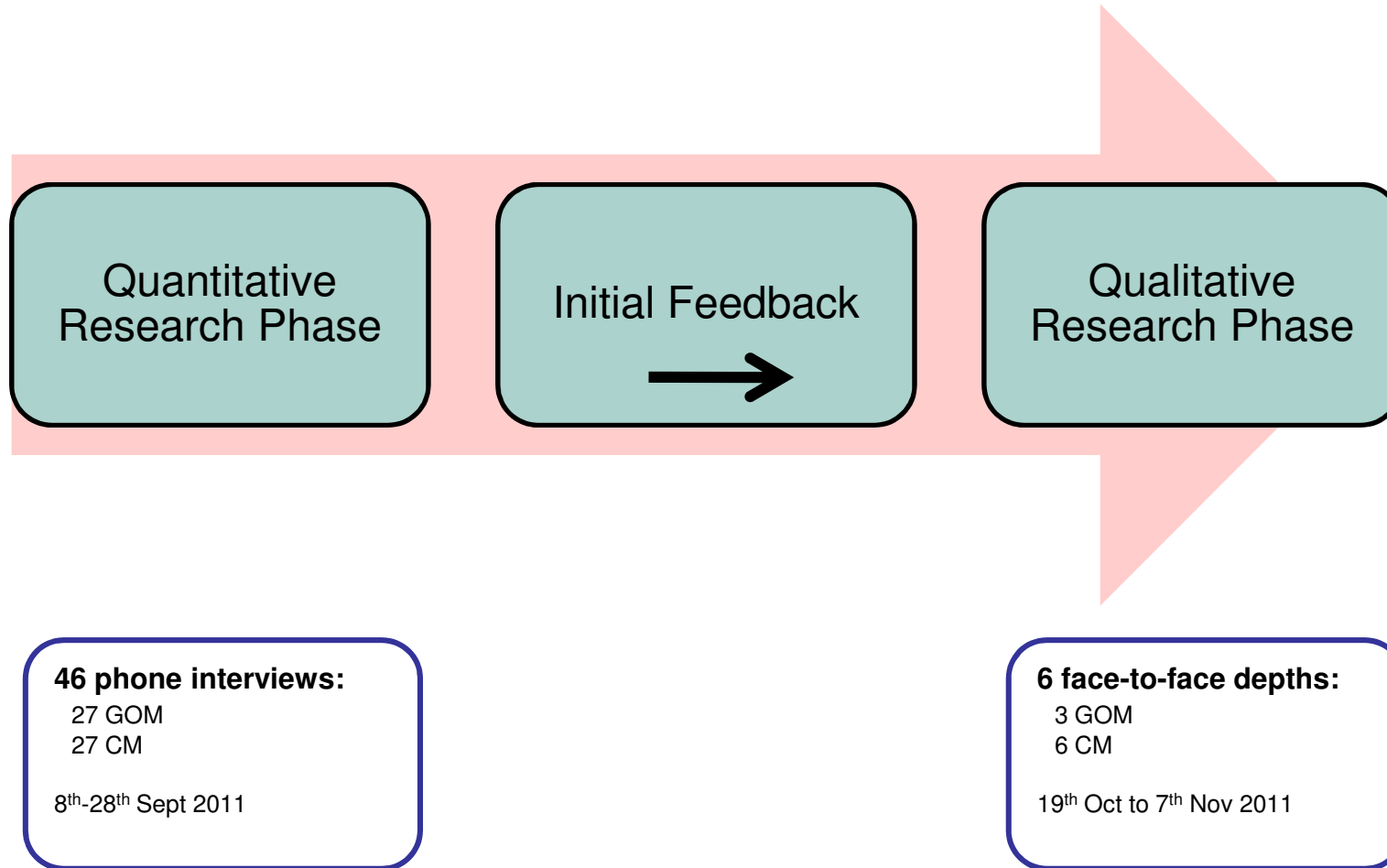


2011 Customer Survey

DTS



Method - Overview



The DTS – Key Headlines (1/2)

- Feedback on ElectraLink’s service in delivering DTS remains **overwhelmingly positive**, but two key scores;
 - **Overall satisfaction** (-7%) and
 - **Value For Money** (-17%)
- have fallen back from the peak levels achieved in 2010.

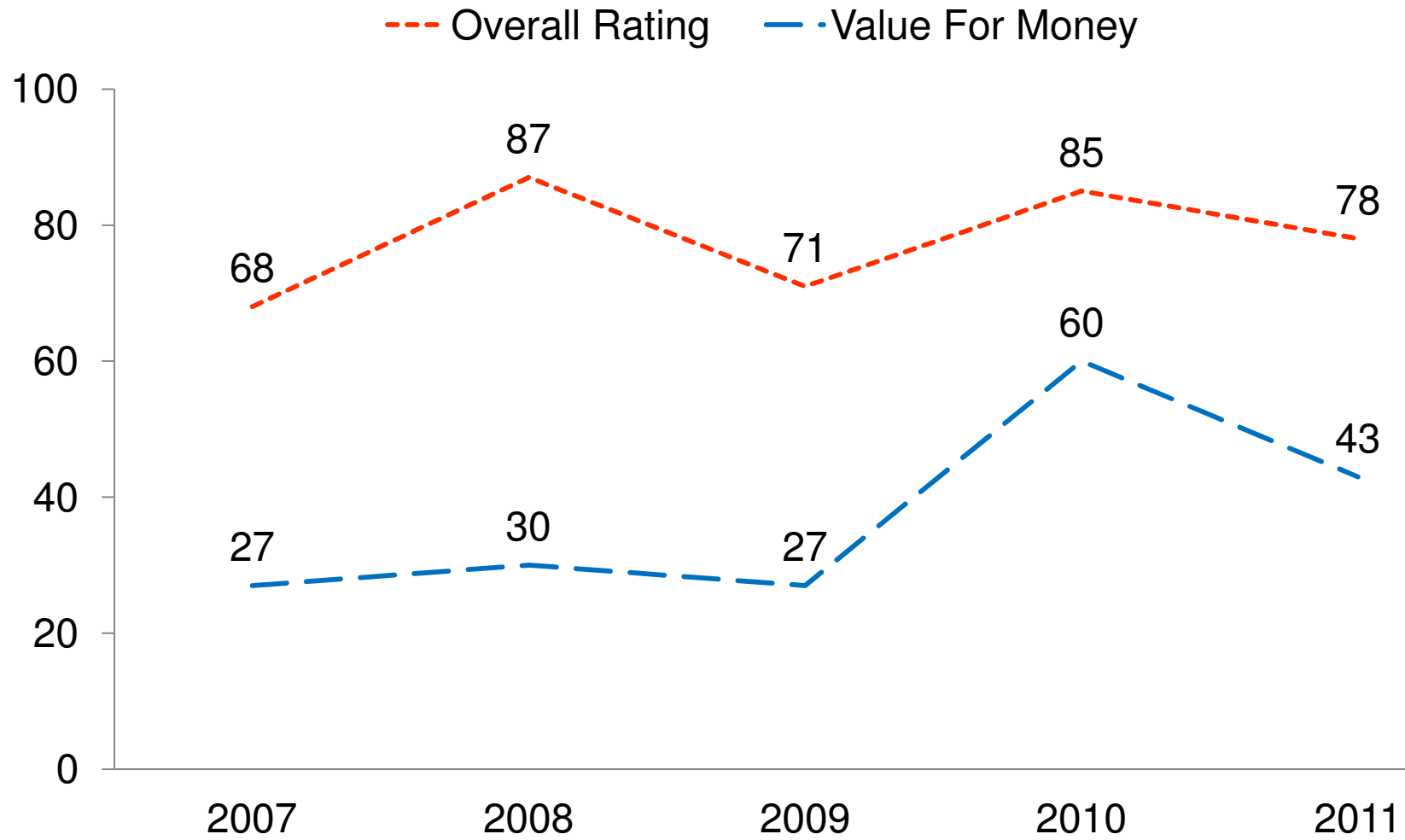
Key Issues

- The most common spontaneous criticism surrounds **communication**. When prompted further **expertise resource, understanding business needs** and **being easy to deal with** are added to the list of areas where perceptions have weakened.

Key Successes

- The **Refresh programme** is helping to bring a sense that ElectraLink is becoming more **professional** and **technologically up to date**. The majority have now experienced an upgrade, and 23% say this has **improved** their service, with none saying it has become worse.
- This is the clearest success over the past 12 months, and this is the main reason why 1 in 4 still feel that service has improved since last year.

DTS

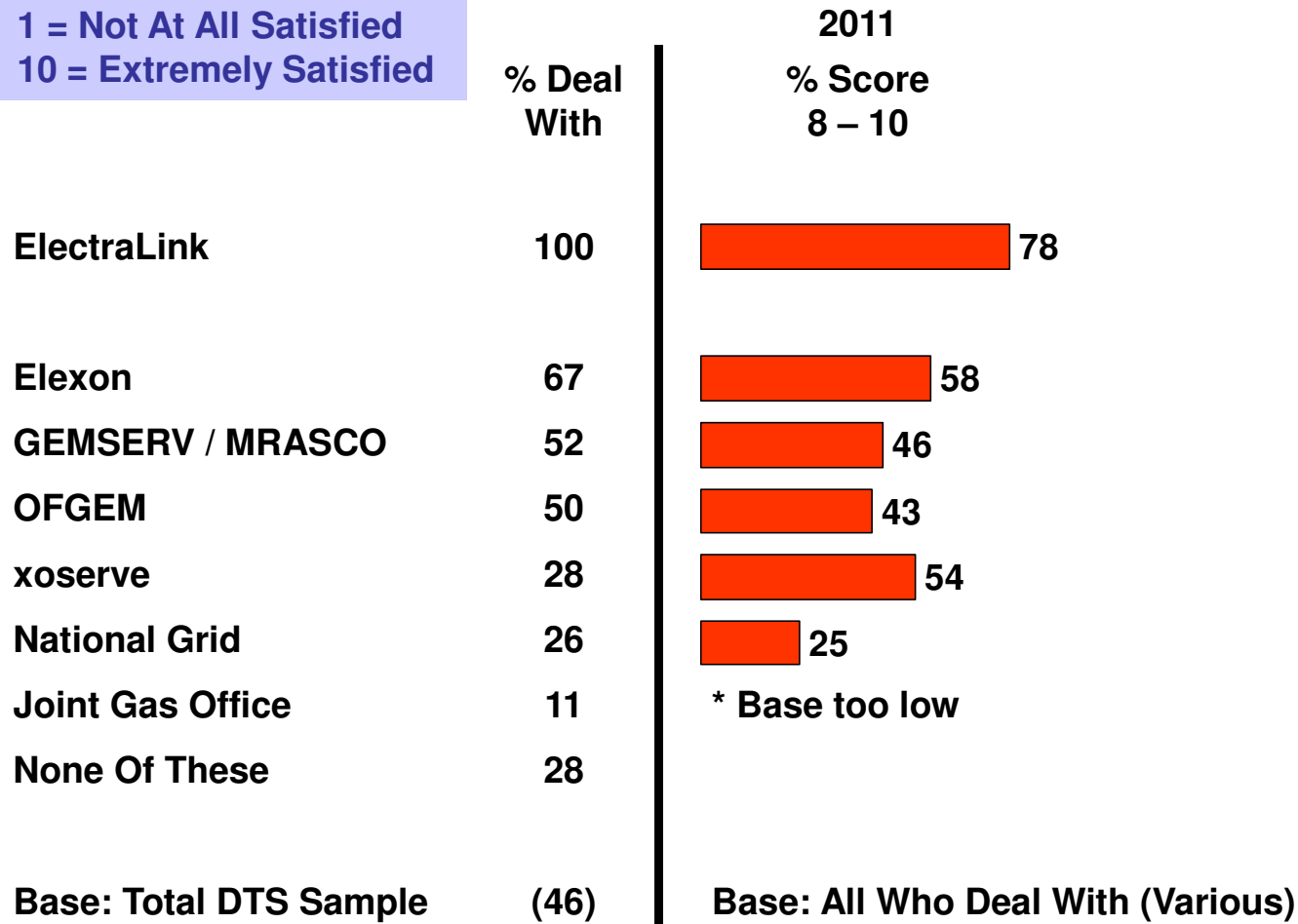


% Scoring 8-10 out of 10

Satisfaction Rating Versus Other Organisations

DTS Sample

1 = Not At All Satisfied
10 = Extremely Satisfied



Main Reasons For Satisfaction / Dissatisfaction

DTS Sample

	Total Sample	Give Score of 1 - 7	Give Score of 8 - 10
Generally Happy With Service	54	60	53
Service Efficient/ Professional/ Accurate	24	0	31
Approachable / Helpful	20	0	25
Communication <u>not</u> so good/ clear	17	50	8
Quick Service / Prompt Turnaround Of Problems	15	0	19
Knowledgeable/ Provide Necessary Info/ Expert	15	20	14
Can Always Improve/ Always Room For Improvement/ Looking To Improve	9	0	11
Issues with gateway upgrades/ hardware	7	10	6
Negative Website/ Email Comments	7	0	8
High Costs	4	20	0
Limited Dealings With Them	4	20	0
Any Miscellaneous Positive Comments	4	0	6
Base: Total DTS Sample	(46)	(10)	(36)

NB: Mentions by 1 person (2%) not shown

Communication – Qualitative Feedback

50%

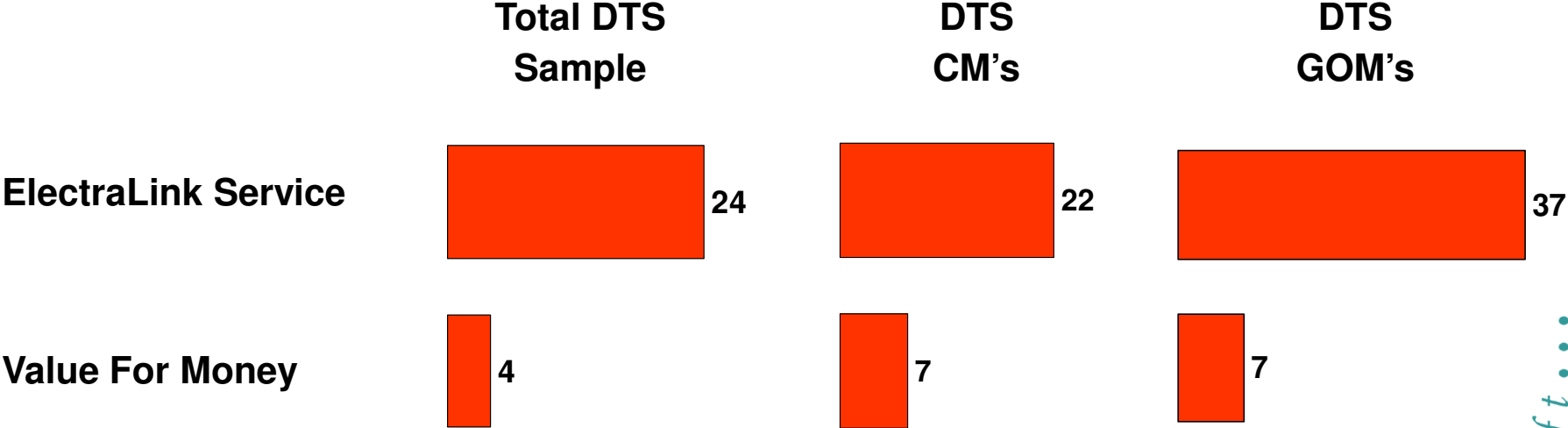
Of those who rate ElectraLink's service less than 8 out of 10, highlight communication as the reason for giving a lower score.

Consistent qualitative feedback is positive.

- Considered fine by most: appropriate, timely and accurate – as it should be, this is a key element of ElectraLink's core skill (administration).
 - The sheer **frequency of communication** was commented on (by 1 person) but acknowledged as an inevitable part of the role.
- **User groups** are generally felt to function well
 - Non-attendees felt comfortable with the feedback they get & didn't want any changes.

DTS: Perceived Improvement Over Past 12 Months

% Improved a little/ a lot



Main Reasons ElectraLink Has Improved / Stayed Same

DTS Sample

	Total Sample	Improved A Lot / Little	Stayed The Same
Have Not Noticed Any Changes	43	0	59
Service Is Consistent / Always Good	30	18	35
Technology improved	9	36	0
Have Little Contact With Them / New To Post	9	0	12
Better response/ more proactive	7	18	3
Have Improved/ More Professional/ Got Better	7	36	0
Communication positive	4	18	0
Don't Know/ No Reason	4	0	6
Base: Total DTS Sample	(46)	(11)	(34)
NB: Mentions by 1 person (2%) not shown			

1 person said that the service had got worse 'The website has reduced the quality of the service'

Technical competence and reliability is a key strength

- This year has seen significant activity around Gateway upgrades.
- Most have gone smoothly, and those that have run into some kind of problem said it had been handled well in terms of a solution & the communications around it.
- Project management skills are very good, as ever.
- The security of data transfer is a key benefit of the DTN, and one that is becoming more not less important to parties.



When things do go wrong, the communication was constant and transparent as well ... I was kept in the loop of how things were going ... in terms of the communication it's fine (GOM)

I've worked in the gas industry with xoserve and had no end of frustrations ... if you compare the two they're the opposite ends of the spectrum ... if ElectraLink were delivering the right things I needed from xoserve , I'd be more inclined to want them to deliver it than xoserve.

The DTS – Key Headlines (2/2)

Specific Service Areas

- ElectraLink continues to achieve average scores on all 8 main service areas of 4 or above out of 5.
- The **webtools** (ACMT & Context Sensitive Help specifically) and the **website being kept up to date** achieved even higher scores than usual this year.
- Feedback on 4 specific aspects have declined though:
 - The quality of ElectraLink billing information
 - Ease of use of the website (although qualitative feedback suggests this may be a temporary response to the changeover rather than a strong negative issue)
 - The way the HP Helpdesk manages fault situations (although we found no explanation for this qualitatively).
 - User group reps feeding back less well than last year.

How Well User Group Representative Provides Feedback On Topics Discussed And Issues Raised At The DTS User Group

2011



Base: Total DTS Sample (46)

Average Rating Of Main Service Areas

DTS Sample

Service Area	No. of Attributes Rated	Mean Score 2011	Attributes Compared*
All Ratings	41	4.15	40
ElectraLink Helpdesk	5	4.48	5
The DTS Itself	4	4.44	4
Gateway Connection	6	4.36	5
DTS Web Tools	8	4.28	8
ElectraLink Reporting Tools	4	4.16	4
ElectraLink Services	5	4.10	5
HP Helpdesk	3	4.09	3
ElectraLink Website	5	4.08	5

Base: All rating each attribute

Electralink Website – impact on perceived ease of use may be a temporary reaction to the changes

Many only rarely use it, particularly if their role is as a contract manager. So perhaps unsurprisingly their grasp of what it contains, and how this relates to what's available on other sites was mostly less than clear.

- They expect it to contain high level info, related to the **admin of the DTS.**
- Some know the **web tools** site is a different site, but some assume it's part of the same website.
- It looks “prettier” than it used to, more accessible & easier to follow..
- No suggestions for further improvement.

I look at it probably once or twice. I looked at it yesterday because I knew you were coming and thought 'oh that looks nice' I've never not found what I needed .

Don't use it a lot, tend to use it mainly for the contacts, so if I want to look at the contact list and I use it for that but I do use it to look for any new content that's in there albeit we tend to get a lot of that on the bulletin board from the web tools so it is a little bit of a mixture of each we've got some furry creatures on there now. ... They're cats, yes they've changed the aesthetic feel of everything.
What do you think? Very good.

I've been on there a couple of times to look around, when I was looking for some information on like general stats I think I was looking for like a company report and a little bit of history on them but that was a while ago. I think that was more when I first started, just to familiarise myself a little bit more with ElectraLink. But I don't usually go on there, the information I need, the reports is usually sent to me and that's sufficient

**Refresh Programme
&
Other New Initiatives**

Refresh Programme – Awareness & Current Status

	Total DTS	CM's	GOM's
Aware of on-going Refresh Programme	78%	74%	81%

When final stage of hardware Upgrade taken place:

In the past 12 months	67	59	74
Planned but not taken place	7	11	4
Don't know	4	4	4

Base: Total DTS Sample

(46)

(27)

(27)

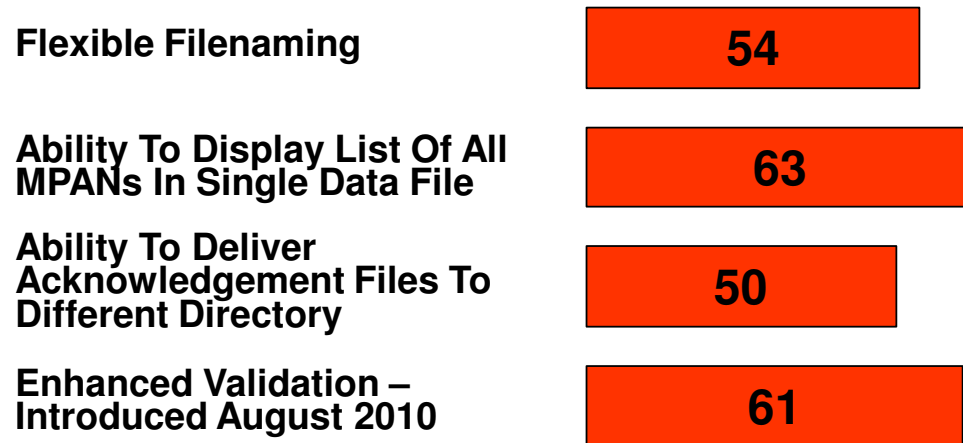
Refresh Programme – Whether Service Has Improved

	Total DTS	CM's	GOM's
Improved	23	19	25
Stayed The Same	58	56	55
Got Worse	0	0	0
Don't Know	19	25	20
Base: All whose companies Upgraded in past 12 months	(31)	(16)	(20)

23% experienced adverse effects during or as a result of the hardware upgrade.

Awareness Of Initiatives Introduced In The Last Three Years

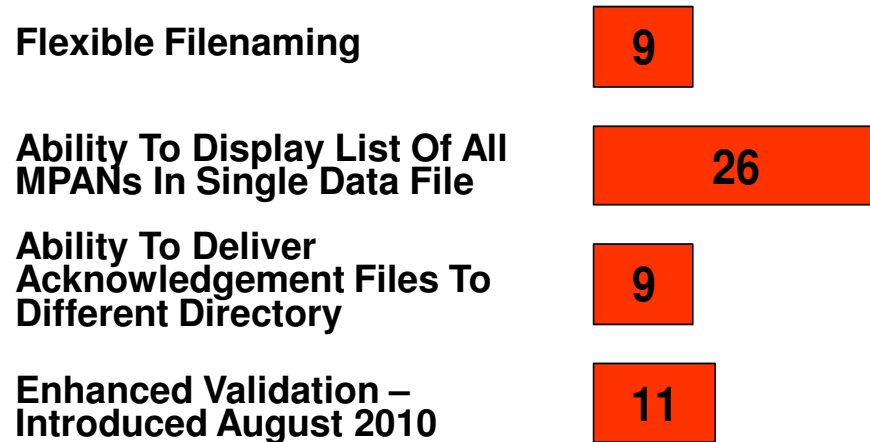
2011



Base: Total DTS Sample

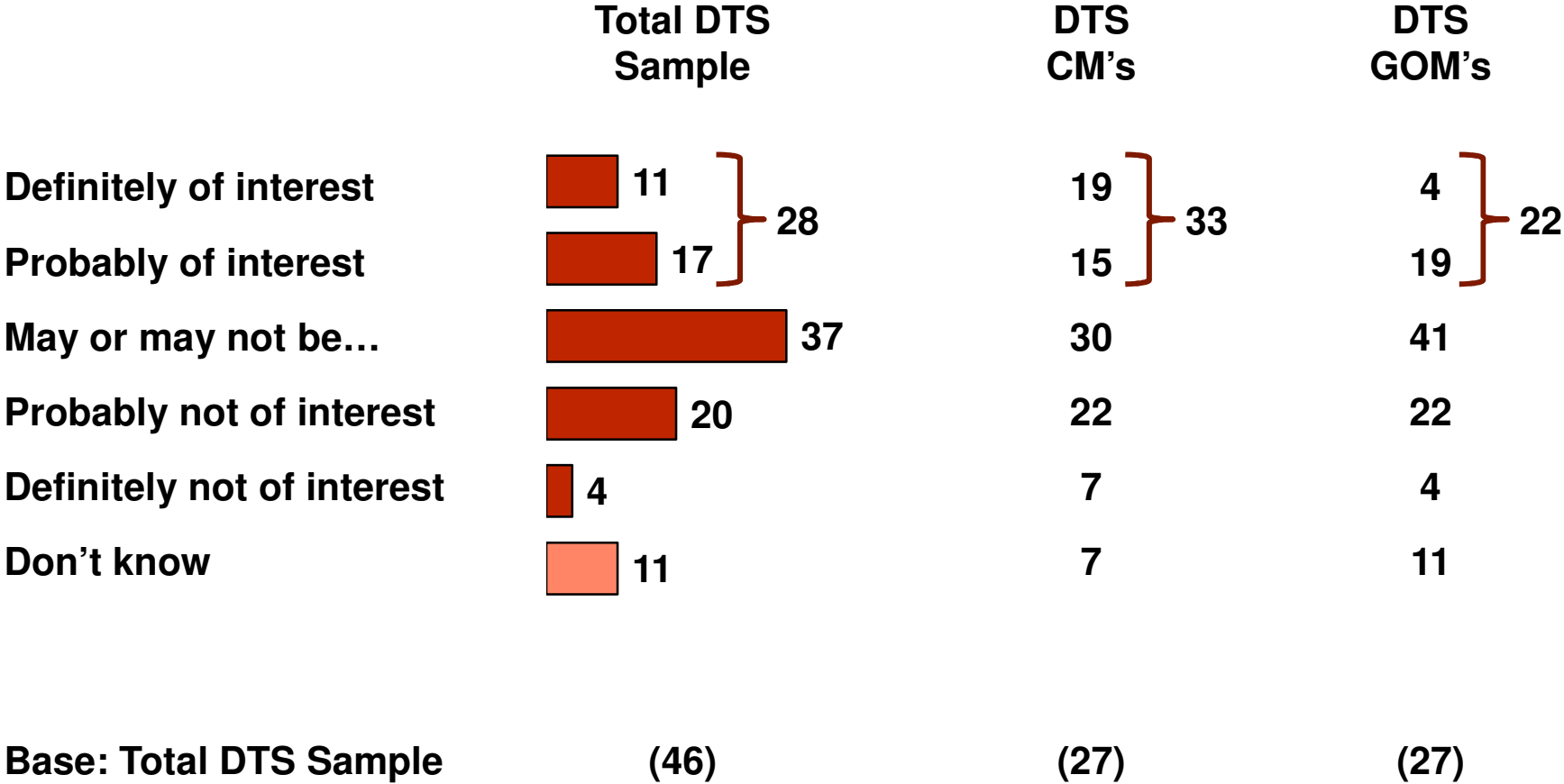
Claimed Uptake Of Initiatives Introduced In The Last Three Years

2011



Base: Total DTS Sample

Interest In A Data Analytics Service Provided By ElectraLink



DTS – Suggested Improvements / Changes

ElectraLink Service

Resolve issues around **communication**:

- Quality/ clarity and possibly frequency.
- Expertise/ succession – continue to counter concerns over depth of resource & expertise.

Look into quality of billing information.

Ease of use of the website (1 person only).

Indirect Issues

Review with HP Helpdesk how they deal with fault situations.

Re-emphasise the need for user group reps to feedback well.

Opportunities

Develop the data analytics concept further.

ElectraLink's Future Role

The DTS – Future Opportunities

- ElectraLink's customers see a number of challenges relating to Smart Metering:
 - Primary issue:** Handling the transfer/ flow of data
 - Secondary issues:** Hardware & system issues, communication and cost.
- There is very little resistance to the idea of using the DTN.
 - 63% are aware of the idea, and 46% support it.
- Many see ElectraLink as a highly suitable candidate to support the migration and eventual implementation – a safe bet. But others have concerns that the way ElectraLink introduces its ideas come across as 'feathering its own nest'.
 - And other organisations are perceived to have a deeper pool of the resource & knowledge required.

Use Of The DTN For Smart Metering

63% Are aware of the idea of using the DTN for communicating with the DCC.



Whether Supportive of using the DTN:

In support	46%
Against the idea	4%
Undecided	50%
Base: Total DTS Sample	(46)

Aware	Not Aware
52%	35%
7%	0%
41%	65%
(29)	(17)