



ElectraLink

Customer Research Report

2019

djs
research

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INTRODUCTION

Every year, ElectraLink commissions independent customer satisfaction research. This research allows us to understand how well we are meeting the needs of our customers and helps us to determine what more we can do.

In recent years the research has informed ElectraLink's Customer Engagement Strategy including a number of service improvements that have taken place across the business. The research also primes ElectraLink on what customers value and how it is performing in these areas.

EXECUTIVE SUMMARY

Our customers continue to welcome the improvements ElectraLink has made to our customer service delivery, year on year. This year's results show us customers see us as advocates for change and innovators, engaging with industry on fast-evolving programmes of transformation.

Last year's survey results told us that customers were looking to ElectraLink to facilitate innovation and provide industry members with more opportunities to engage with one another so we can collaboratively develop solutions to the challenges facing the UK energy market. We listened and responded this year by creating workshops, industry engagement days with roundtable discussions, inviting international speakers to share their experiences, and training on the new code management and data tools we developed.

In 2019, we continued to expand our offer, moving beyond purely secretariat services to establishing high quality code leadership, underpinned by insightful data, to provide assurance to the energy market. We launched three new code websites and launched new services. This has been reflected in a further increase in the overall satisfaction in our Governance Services with particularly high scores in our code engagement programmes. We look to our governance customers to continue to request supportive code engagement measures from ElectraLink through their code bodies.

As a regulated central body, owned by the energy industry for the benefit of the energy industry, our Data Transfer Service (DTS) underpins the UK energy market. In recent years we have seen our DTS customers rate us exceptionally highly for delivering a quality and reliable data transfer service, with further customer support for developing innovative tools that support industry more. In 2019 the service was interrupted by two incidents of network disruption that shed light on our need to improve our DTS communications policies and procedures. We took immediate action to revise our emergency response communications policy and this will be a cornerstone in our planning for next year.

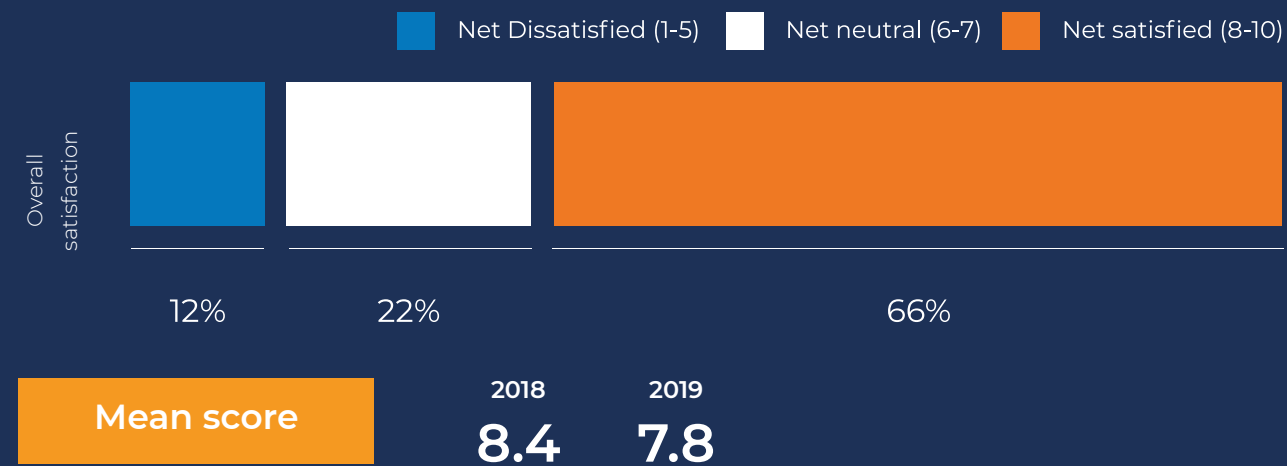
As we move into 2020, we have plans to add more team members to meet our business goals and provide best in class service to our customers. ElectraLink will continue advocating for innovation and providing avenues for customers to share their ideas so we can better support their businesses with governance services, and data and transformation services. We will work hard to revise our communications with the intention to communicate with clearer language, more streamlined and with more information.

Thank you to all ElectraLink customers for another informative satisfaction survey, a busy and productive year, and hope that you continue to provide your feedback so we can meet the needs of your businesses.

DTS CUSTOMER RESEARCH

Key measures

Overall satisfaction for the DTS remains high, though we have seen a drop against last year. This is likely due to two significant outages that happened during the year



These outages are the first that our customers have experienced for over a decade so it is understandable that this will have an impact on our customer's satisfaction but feedback on how these outages were managed act as an explanation as to why the drop was not more significant.

"It has worked as expected and fundamentally that is the most important thing. When things have gone down or there's been a problem, ElectraLink have been quite proactive."

Proactive approach

"I've been really impressed with the service - especially the support we've had when we've had issues. The technical support has been really good as well."

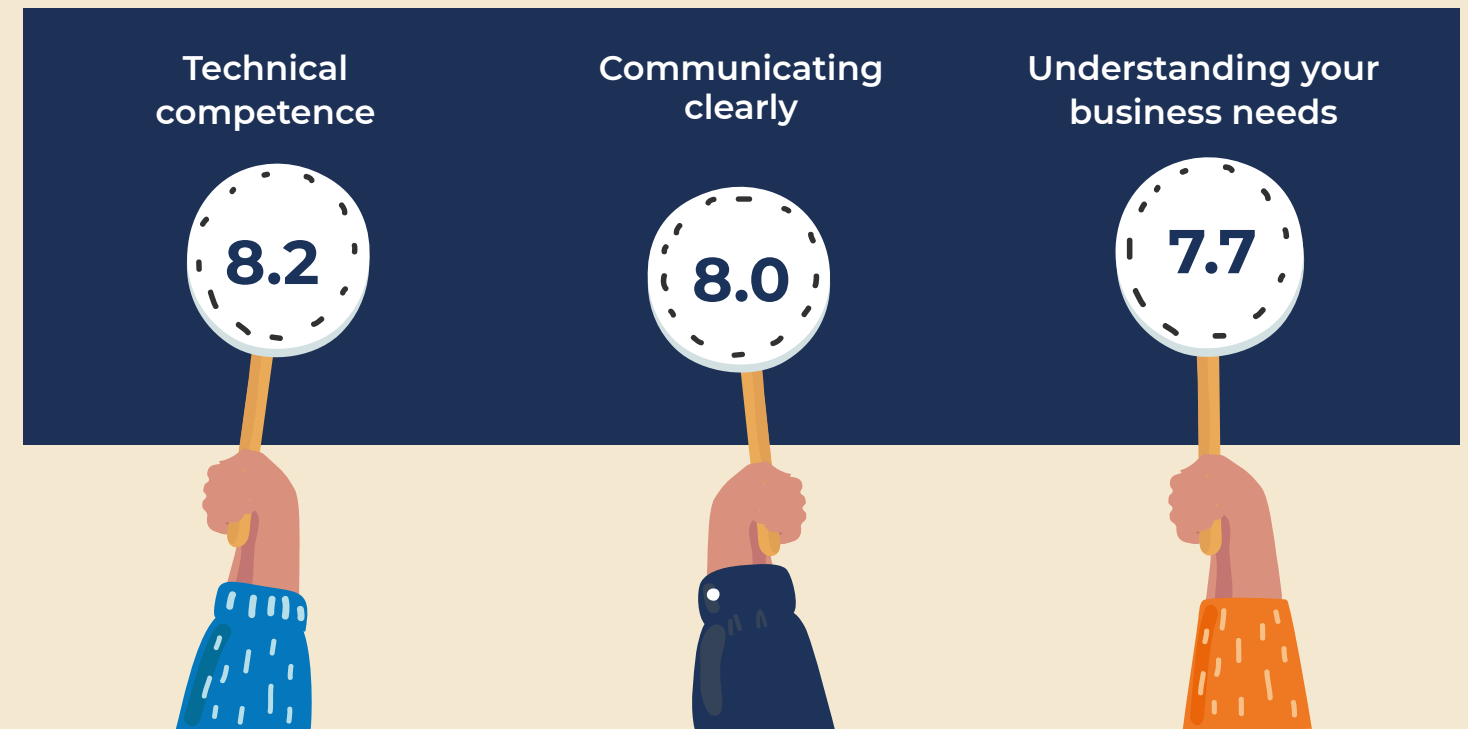
Really good technical support

"ElectraLink are much better at customer engagement than any other service provider"

Best customer engagement

Key performance measures

We believe our customers should play a central role in setting our priorities so, as part of this research, we ask customers what matters most to them. We scored well against all three of the areas that our customers valued most highly, though we recognise that there are some improvements we need to make in understanding the business needs of our customers.



By plotting our results on a matrix that maps the importance to our customers of our key performance measures against our satisfaction scores, we have identified which areas we need to focus on for improvement. As previously stated, we have recognised we need to do more to understand your businesses better. We also need to continue our commitment to make our communications clearer, all of which is reflected in our action plan.

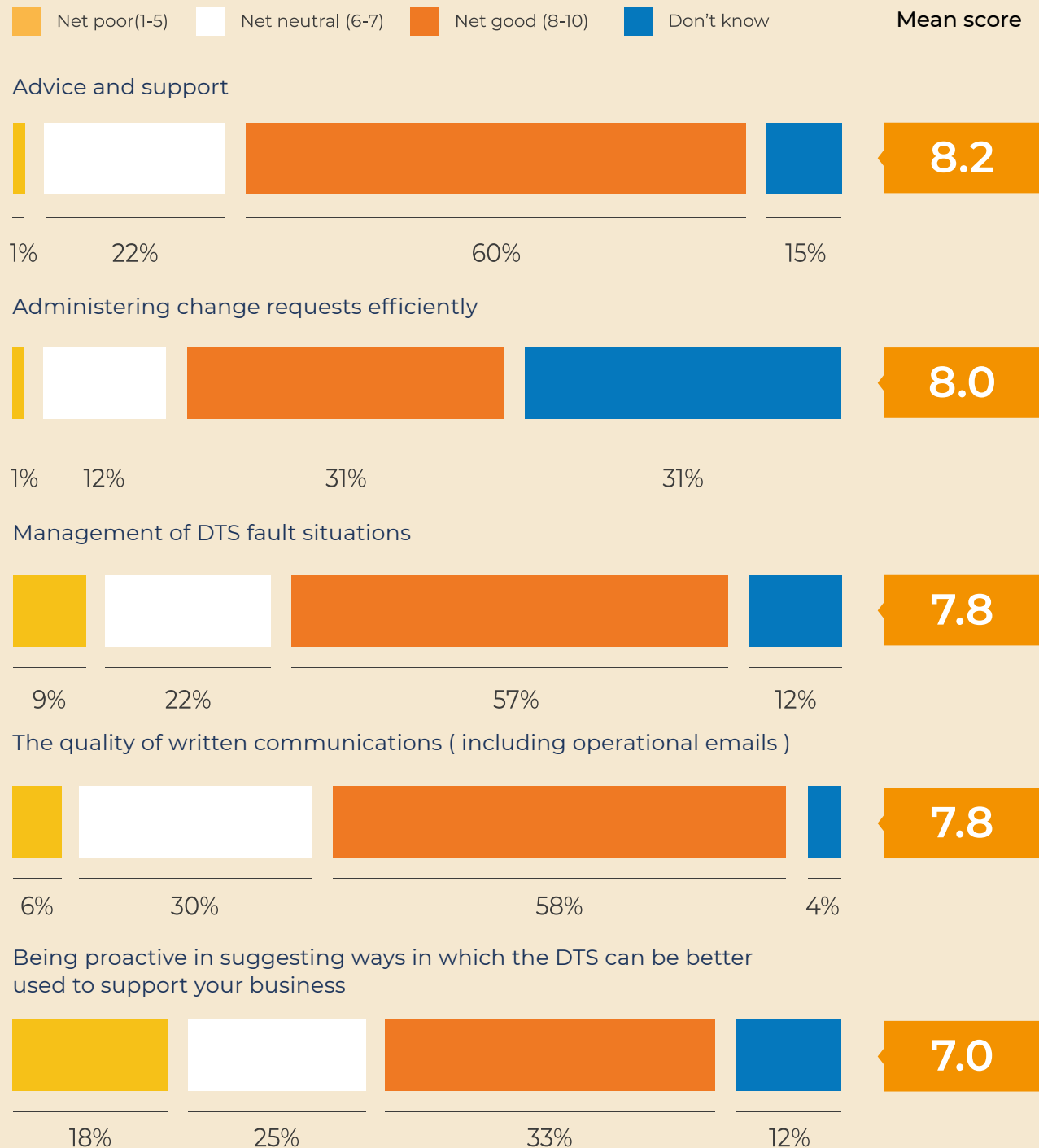


Satisfaction with the services provided by the DTS

We continue to see high satisfaction scores across the DTS services, however we have seen some decreases in our score for managing DTS fault situations and the quality of our written communications. While the decrease primarily relates to an increase in those who responded 'don't know', we have already taken action to improve the processes around managing fault situations and continue to review our written communications to identify improvements.

Improvements made to managing fault situations:

- Greater level of communication throughout the process
- Revision of our crisis communications procedures
- Addition of a crisis communication contact within customers businesses



Engagement

We believe the best way to ensure the optimum service to our customers is continual engagement. This includes both providing means for our customers to seek support from us and also proactive engagement on our part.

Support to our customers

Overall, over two thirds of customers rated their satisfaction between 8-10 for the support received from the DTS.

Phone and email remain the most popular means for our customers to contact us and we are pleased to see that the satisfaction with these tools continue to grow



Mean score

Overall helpfulness

8.9

The quality of the response you receive

8.5

- Yes, via phone or email
- Yes, via the support portal
- Yes, via webchat
- Yes, via the DXC helpdesk

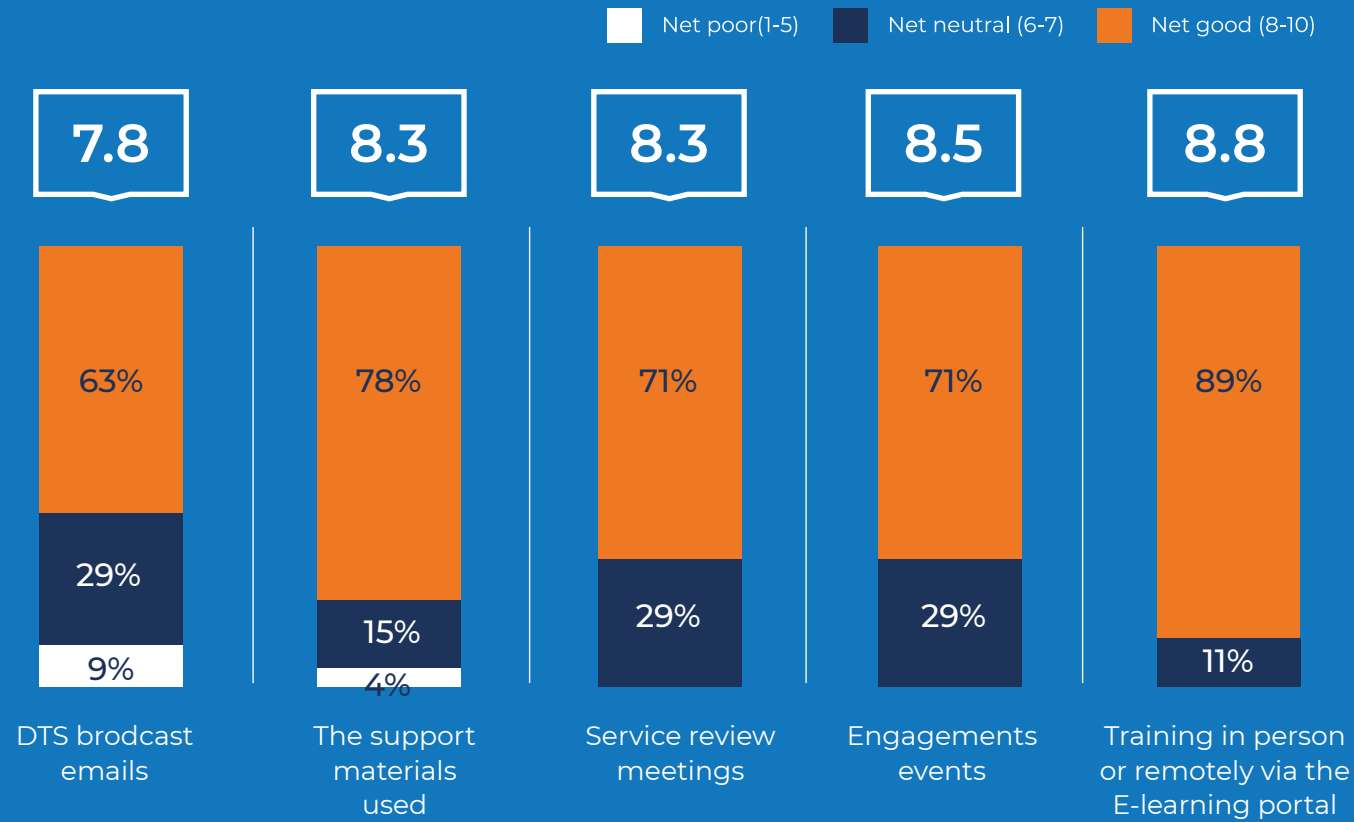
"They've been fantastic. I phone them up multiple times with questions and queries and they are always really responsive. They're great."

Always responsive

We are also seeing an increase of 14% in the use of webchat. In our previous survey we had an action to increase our customer's awareness of this tool so we are pleased to see that we have seen some improvement in this area.

Satisfaction with the services provided by the DTS

We are pleased to see that satisfaction for our proactive engagement remains high and have seen an improvement in the satisfaction with our engagement events. We have taken on board that there are improvements to be made to our DTS broadcasts, which is captured in our action plan.

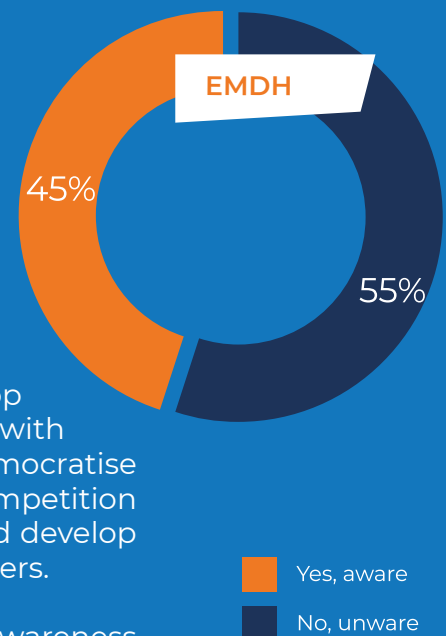


Network service awareness

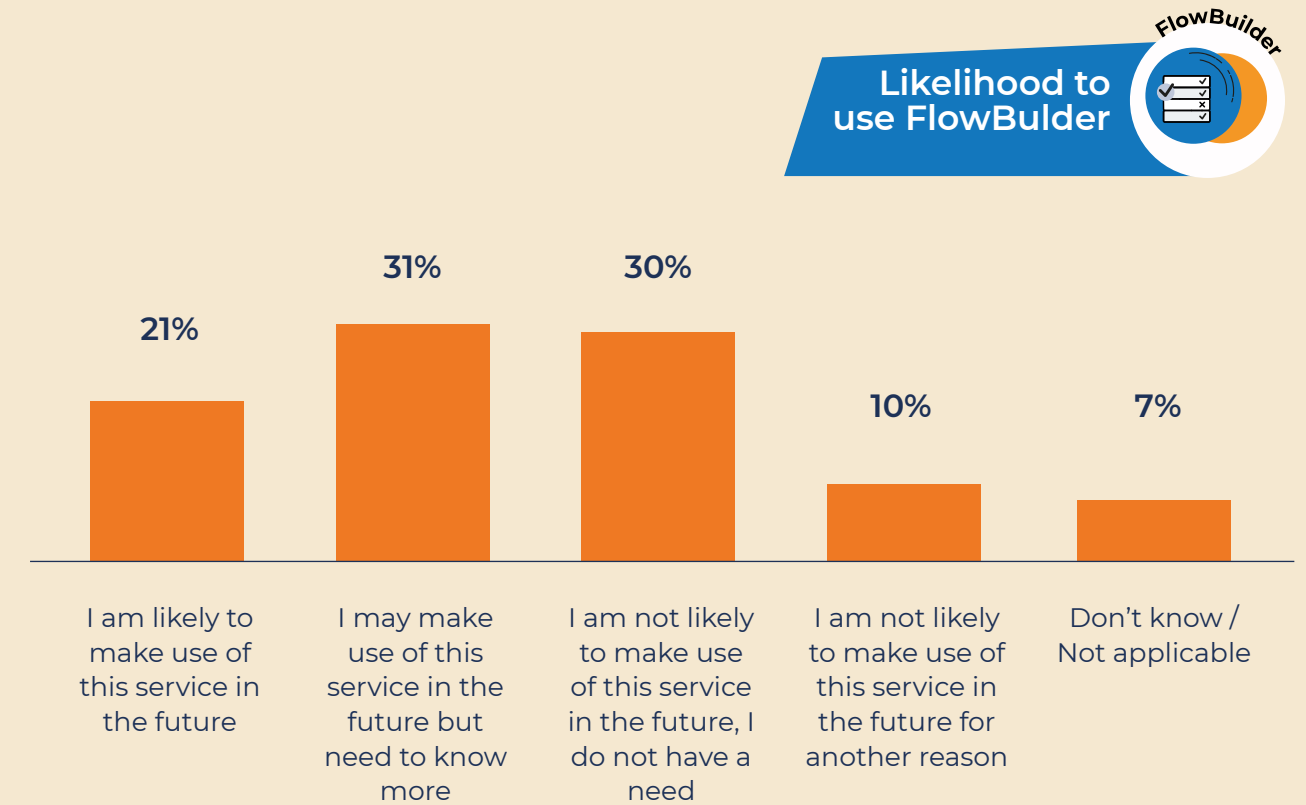
ElectraLink is focussed on the future, continually evolving to improve and develop our existing services and deliver new solutions in a transforming marketplace. We don't wait for the market to identify problems, we use our market intelligence to anticipate issues and proactively deliver solutions.

2019 saw us launch the Energy Market Data Hub (EMDH), our new platform that encompasses the DTS and allows us to partner with a variety of utility stakeholders to develop innovative data transfer, insight and analytic solutions, with in-built governance structures. The aim of the EMDH is to democratise access to energy market data, enabling innovation and competition across the full spectrum of energy market participants and develop solutions that ultimately bring notable benefits to consumers.

Awareness of the EMDH has increased but improving awareness of the EMDH remains an area for improvement.



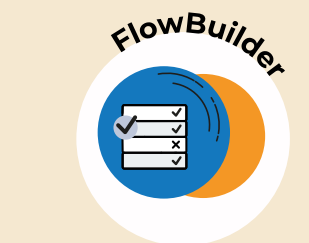
One of the solutions that is now available on the EMDH is FlowBuilder, a tool that allows you to design, test and share flows - reducing the risk of errors from catalogue changes and allowing innovation to flourish without the need for long change processes. Over two thirds of customers are aware of the FlowBuilder tool. A fifth would be likely to use the tool now, while just under a third would look at using it if more information was provided.



Future developments to FlowBuilder

Before the end of 2019, DTS Users will see a number of new developments that will significantly improve the functionality and benefits of FlowBuilder. These developments include:

- The ability to access multiple catalogues and create new flow templates for both the gas and electricity markets
- A single gas catalogue, to be launched in 2020
- The ability to link your systems to FlowBuilders API to access catalogue structures and changes automatically



[Click here to find more](#)

MOVING FORWARD

1 Our customers want us to understand their businesses better.

ACTION

Our data transfer solutions go beyond just data transfer to provide a wide range of services to the utilities industries. However, customers want us to know their businesses better. We are working to develop an innovation lead group that can dive into the nuanced business operations to cater our solutions to our customers more specifically. Our 2020 engagement programme will drive this initiative.

2 There is still scope to improve our DTS broadcast emails

ACTION

We will continue to identify ways in which to improve our communications including using less acronyms and more plain English. Also, we will look to provide more broad updates to actions within our engagement programmes on a quarterly basis. We will provide more clarity as to when there is action required and by whom.

3 Some of our customers want more targeted engagement

ACTION

In the effort to get to know our customers businesses better, we will explore the possibility of re-forming the DTS 'small supplier' forum along with more targeted 1-1 engagement with energy service providers that have complex and unique operating systems.

4 Increase awareness of the EMDH including helping DTS users to better understand the applications of FlowBuilder

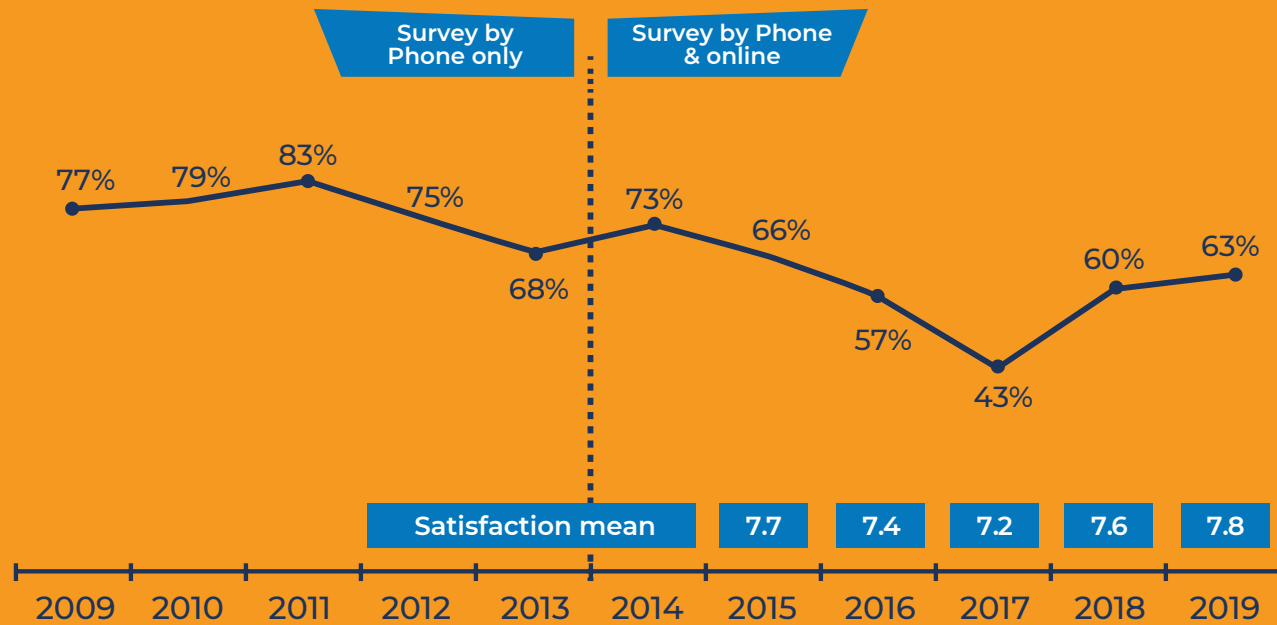
ACTION

We will soon be launching the next stage of FlowBuilder, which incorporates the gas catalogue. As part of this launch we will explore ways in which to improve users understanding. We will also continue to promote the EMDH with our customers.

GOVERNANCE SERVICE CUSTOMER RESEARCH

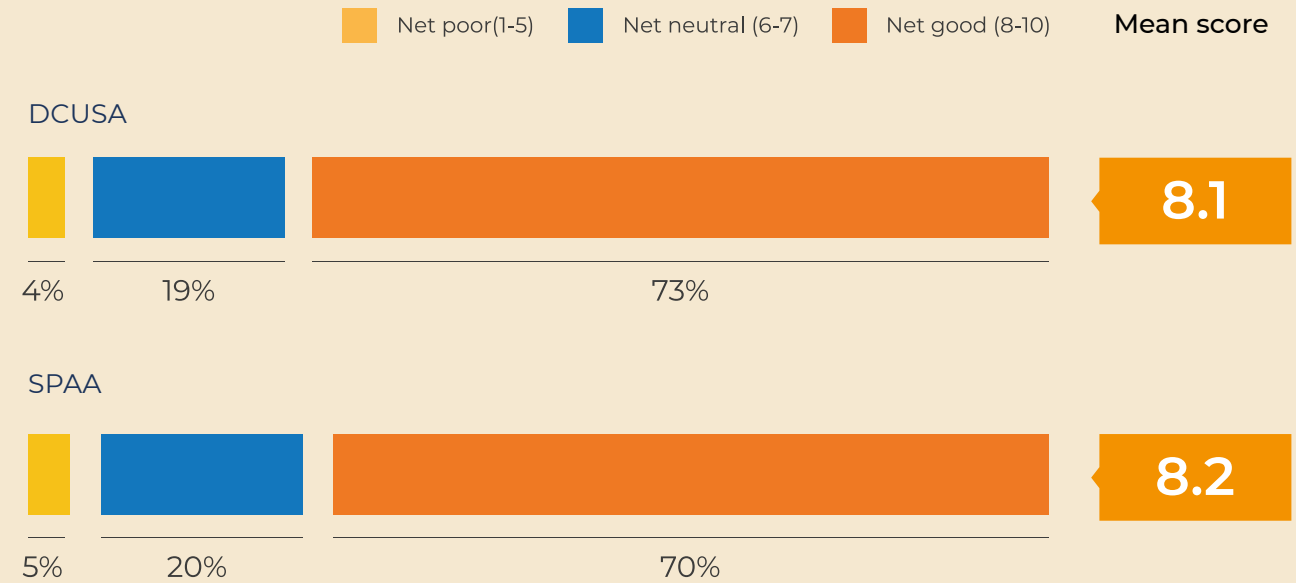
We are really pleased to see that the overall satisfaction for ElectraLink's Governance Services has improved by 20% since 2017, bringing our score to 63%, which is the best score we have achieved since 2015. From the feedback we have received, this improvement seems to be driven by the perceived value for money of our codes and the knowledge and professionalism of our staff.

Excluding don't knows overall satisfaction increases to **68%**



Performance of key industry codes

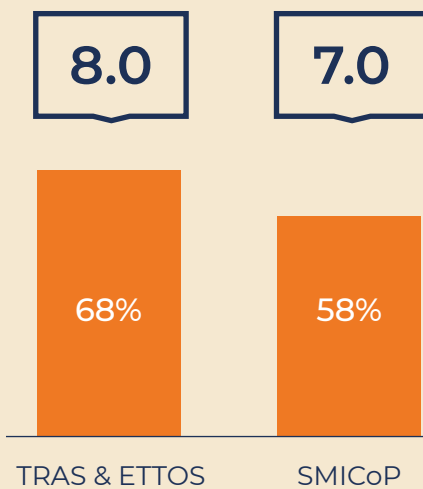
DCUSA and SPAA (including AMICoP and MAMCoP) not only represent our best performing codes but are also the codes where satisfaction has increased most substantially since last year.



Efficiency & organisation
 "I've always found the service to be professional and effectively run. Help and advice is provided if needed together with guidance through the particular processes e.g. change management."

Knowledge & professionalism
 "Chairing meetings, they are particularly good and making sure everyone has their say, follow up afterwards and leading people into discussions and keeping things moving, particularly for timescales."

Fast response
 "On the occasions where I have needed responses to any concerns or question I may have had, ElectraLink's service and speed of response has been exceptional."



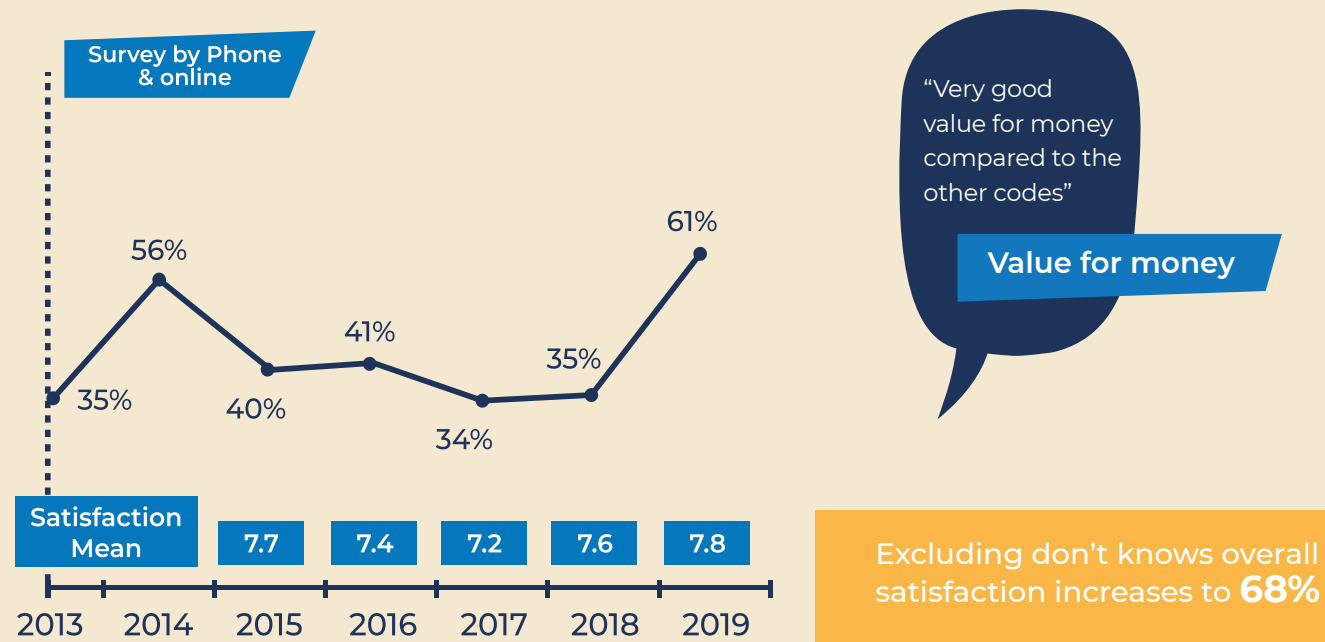
SMICoP TRAS & ETTOS also performed well but for TRAS & ETTOS this year's score did see a slight decrease on previous years. We have reviewed the feedback in order to establish a possible reason for this decrease and have actions captured in our action plan

"I find it easy to find information from their website. The contacts are highly competent and approachable and they manage the sharing of information in a timely, knowledgeable and highly competent way."

Key performance measures

Value for money

We at ElectraLink are passionate about offering services that are value for money. For that reason we ensure that our codes have some of the lowest delivery costs in the market, while still maintaining the excellent levels of customer service our customers have come to expect. This year we have seen a dramatic improvement in our value for money satisfaction level which we believe reflects this commitment.

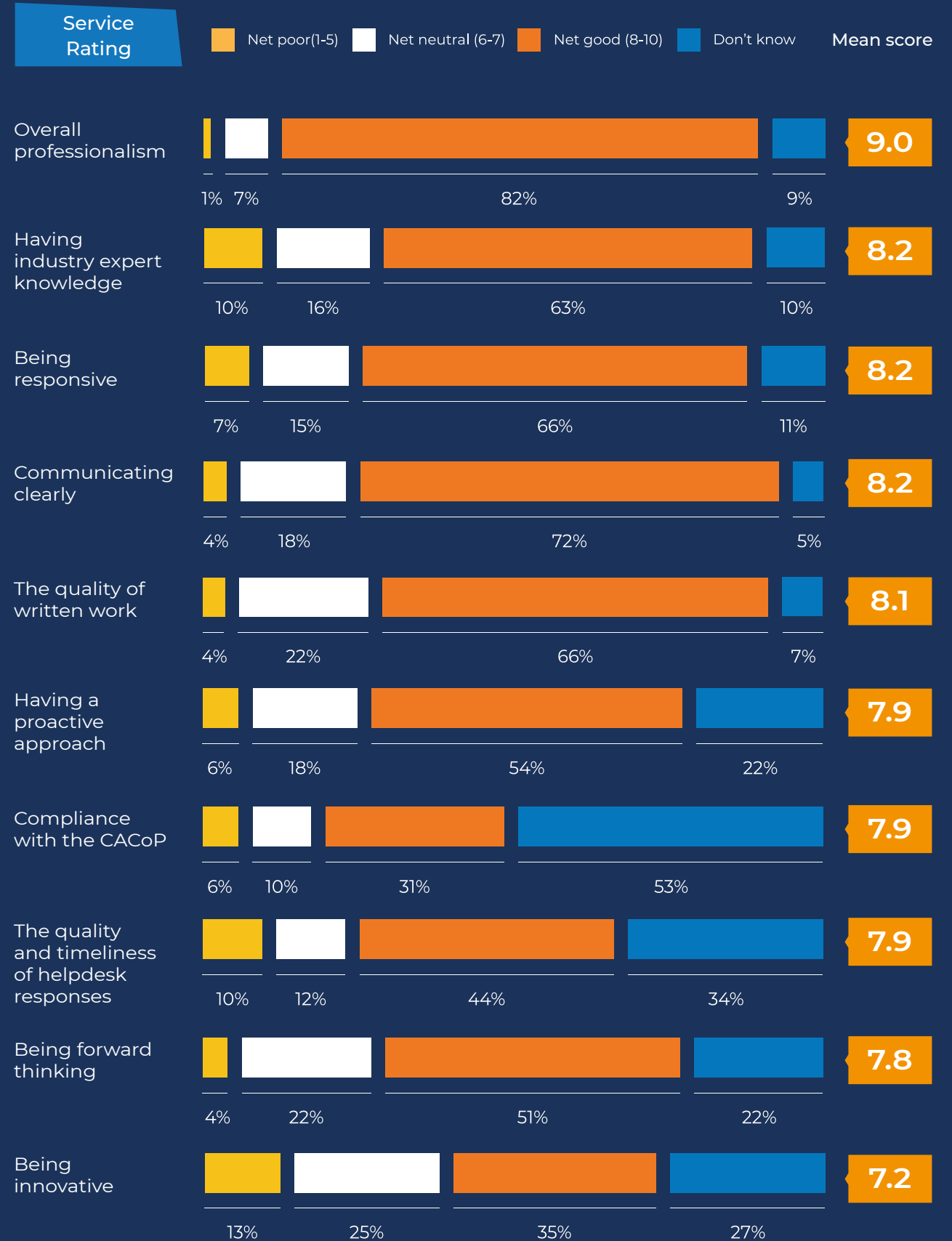


100% of respondents scored TRAS & ETTOS a net good score of 8-10 for value for money and no one scored any of our codes a net poor score of 5 or below

Priorities

We believe our customers should play a central role in setting our priorities so, as part of this research, we ask customers which qualities they would you say is most important for a Code Manager to demonstrate. They identified:

1. Having industry expert knowledge
2. Communicating clearly
3. Being forward thinking



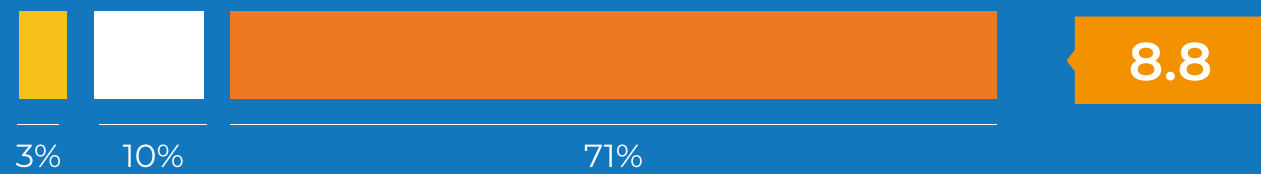
When looking at the detailed breakdown of the service ratings it is clear that the areas we need to build on are being forward thinking and being innovative. This is something we have already made improvements in including the launch of CodeNavigator, our first of its kind web-based tool that untangles the complex web of energy rulebooks, to introduce greater efficiency to code management and make it easier for Code Members to ensure compliance.

Satisfaction with the services provided by the Governance team

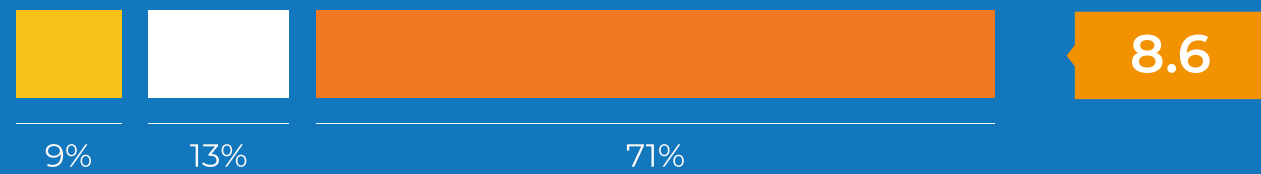
Overall, we have seen an improvement in satisfaction across all aspects of the management of our codes and in each aspect we have a net good score.



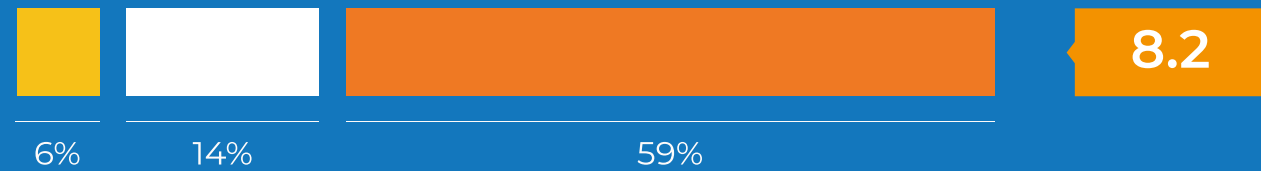
The efficiency with which ElectraLink agrees and confirms meeting arrangements



The quality of meeting documents, such as agendas, papers and minutes produced

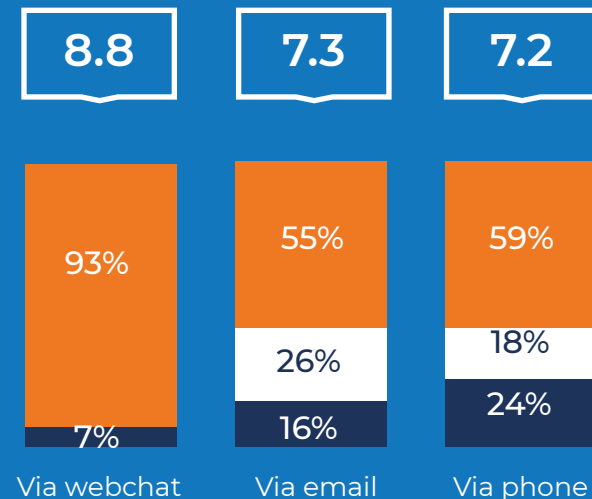


ElectraLink's efficiency in managing the change process (not the quality or efficiency of the agreement itself)



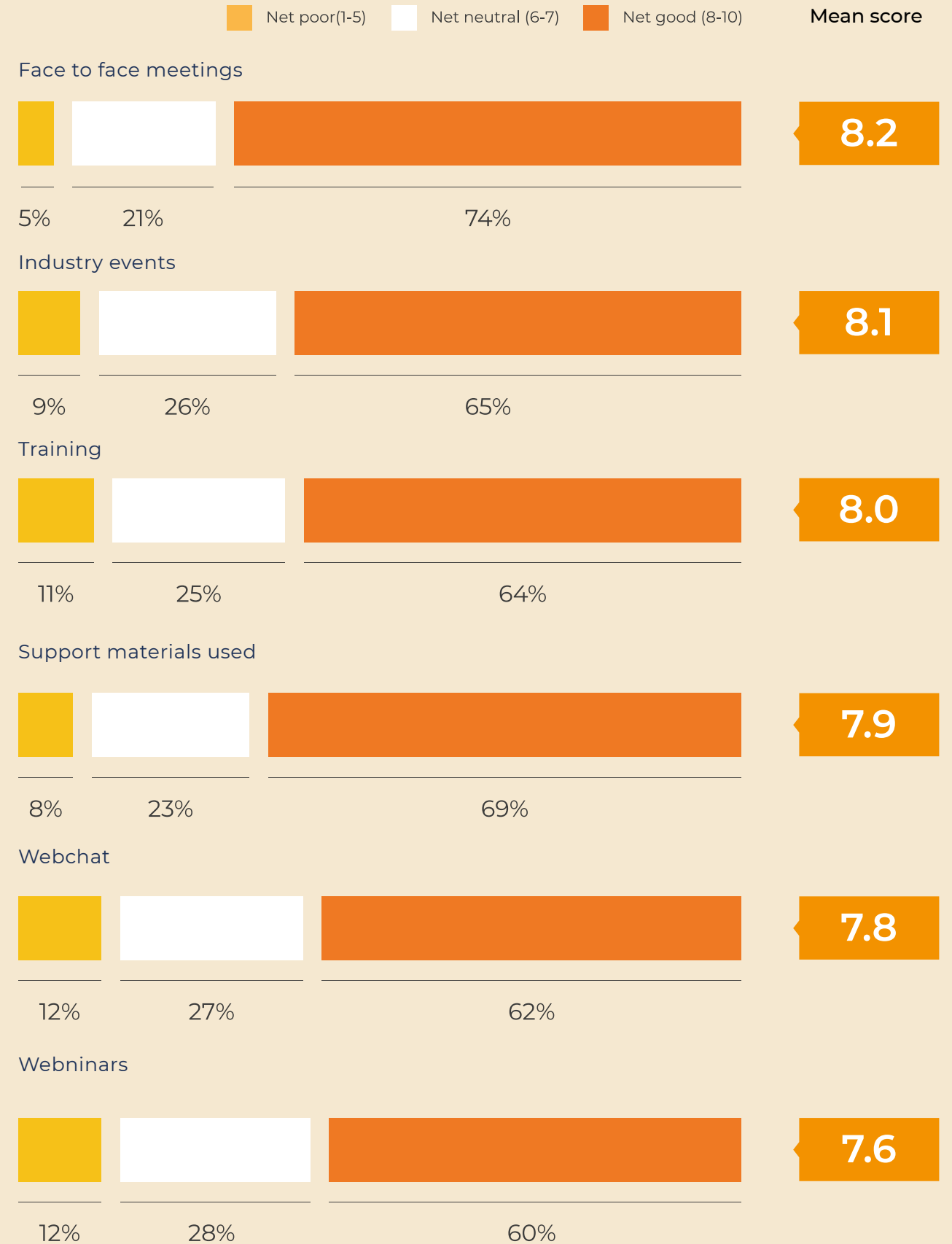
We also wanted to understand how satisfied our customers felt with the various helpdesk options we offer. All of the channels performed well but overwhelmingly, webchat scored the most highly and has also seen an increase in its use (22 to 26%).

There was also some very clear feedback for us to consider about the speed of our response to enquiries. We have reflected on this in our action plan.



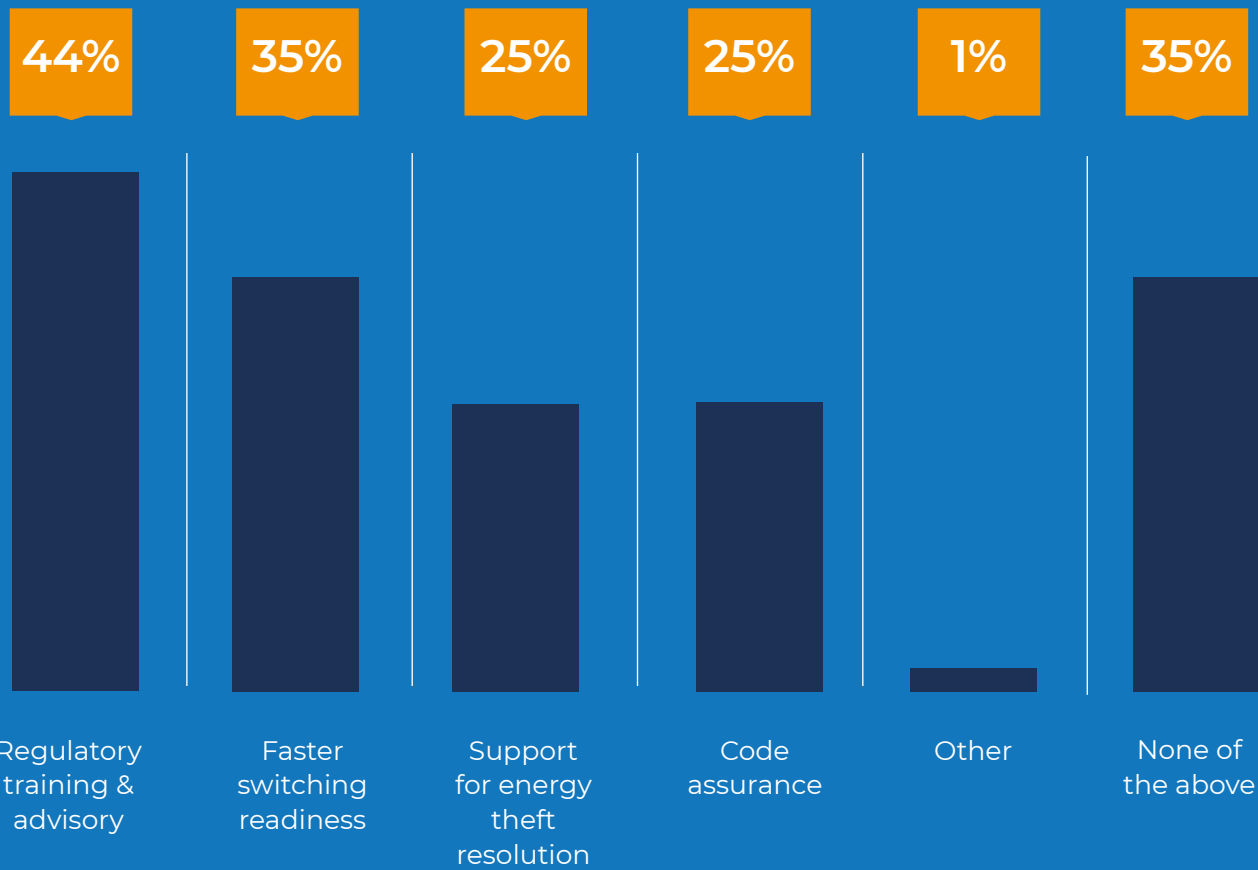
Customer engagement & communications

Over the last year we have been increasing our level of engagement to support the codes. This has been well received as reflected in the customer satisfaction.



Interest in additional services

A little under half of customers would be interested in regulatory training and advisory services. While support for energy theft resolution and code assurance are deemed to be less interesting.



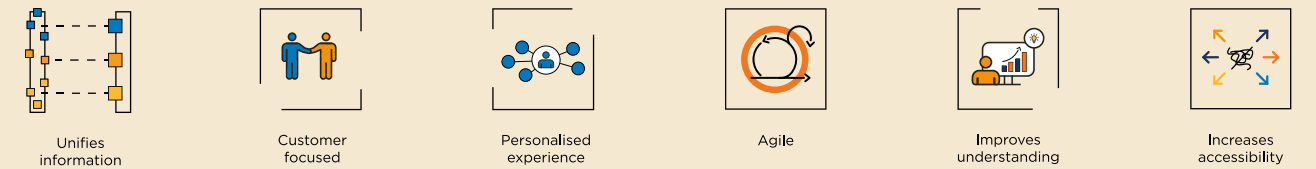
Services introduced this year

This first of its kind web-based tool will untangle the complex web of energy rulebooks, to introduce greater efficiency to code management and make it easier for Code Members to ensure compliance. CodeNavigator enables users to easily find the information – including obligations – that is relevant to them without having to spend time sifting through the endless papers or PDF pages.



CodeNavigator

[Click here to find more](#)



MOVING FORWARD

1 Continue customer engagement for the benefit of code leadership.

ACTION

Our governance services are hinged on code members requesting our support through their code body and, because of customer requests, we were able to lead an integrated code engagement programme in 2019 that was well received with high satisfaction results. We hope code members will continue to find value in these activities and request our support in 2020.

2 Speed up the rate of response for enquiries and provide a named contact so that it is easier to follow up

ACTION

We have already streamlined our code communications and added additional channels for customers to contact. As part of our revision of communications procedures, we will add individuals' contact details in our responses to customers and other code emails.

3

Customers said we should look at implementing more modern ways of engagement and less London Centric.

ACTION

We have expanded our offices with a site in Nottingham and are looking at ways of hosting industry meetings and engagement events outside London. ElectraLink have implemented better virtual conferencing facilities and webinars to help customers outside London connect with us and will continue this journey of digitisation.

4

“Consultations are packed in zip files on the website. It would be better if individual documents could be searched.”

ACTION

Our goal is to move entirely away from physical files for code documentation and use more flexible online platforms to manage codes and consultations. We have introduced CodeNavigator, a first of its kind web-based tool that untangles the complex web of energy rulebooks, to introduce greater efficiency to code management and make it easier for Code Members to ensure compliance. Our goal is to build on this and ensure all our codes can be managed this way.



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