



CSBA Credentials

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Your pathway to exceptional customer experience

'Customer centric businesses become industry leaders by delivering outstanding customer experiences'

Paul Van Veenendaal
CSBA Managing Director



Customers have higher expectations than ever before. Your customers now expect a successful, easy and satisfying experience every time they engage with you.

At CSBA we help you to fully understand these expectations; to meet and exceed them; and, to become a truly customer centric organisation.

This transformation leads to happier, more loyal customers, and more engaged and focused staff. In turn, this ultimately allows you to deliver an exceptional customer experience, more cost effectively.

DISCOVER

Understand and engage with your customers, staff and stakeholders

Discover what the people who matter most to your business, think and feel about your business.

Gain invaluable insight into their motivations and preferences.

Gather independent and accurate data and feedback.

Assess your organisational service capabilities and compare them to your competitors and best of breed businesses.

Identify gaps and opportunities to improve and ultimately excel.

SERVICES

- Customer research
- Employee research
- Stakeholder research
- Customer journey mapping
- Customer centricity audits
- Analysis of existing research and data
- Quantitative and qualitative research services.

DESIGN

Design and develop a customer centric organisational framework

Create a clear pathway for evolving and improving your overall customer experience.

Develop a blueprint for engaging with your customers, that is aligned with your broader strategic business objectives and plans.

Devise a carefully structured program and prioritised initiatives that will enable you to become a truly customer centric business.

SERVICES

- Customer experience strategy
- Customer Centricity Program
- Customer Charter development
- Performance Framework
- Services Catalogue.

TRANSFORM

Operationalise customer experience frameworks and improvements

Transform your business and create an environment where every team member shares the same vision and drive to deliver great customer experiences.

Empower your people through customised training and coaching programs.

Enable them to truly understand customer expectations and how to create exceptional experiences.

Support them with resources, processes and systems. Reward and recognise excellence.

Embed an organisational culture focused on delivering outstanding customer experiences.

Become an industry leader.

SERVICES:

- Training, coaching and professional development
- Business improvement
- Process streamlining
- Policy and protocol simplification
- Service SLAs and KPIs.

ASSURE

Assess and assure customer experience excellence

Implement an independent quality assurance framework that provides peace of mind and ongoing assessment and measurement of customer experience.

Track and monitor shifts in key experience metrics such as satisfaction, ease and sentiment

Provide the valuable feedback and insights your people need.

Identify areas for improvement and investment and set your priorities for digital strategies.

SERVICES

- External Quality Assessment
- Internal Quality Monitoring.
- Mystery shopping
- Customer research tracking
- Industry benchmarking

CSBA is the industry leader in Utilities Customer Experience Research

CSBA on a page

Experienced

CSBA has partnered with the Utilities Sector for over 20 years to assess and improve Customer Experience through:

- Quantitative research and tracking studies
- Qualitative research
- Benchmarking
- Business Improvement Consulting

Research & Analytics Specialists

We bring years of analytical experience to support you with focussing in on what's important to your customers in plain and simple language that all levels in an organisation can understand.

Energy and CX Focussed

We are a niche agency that only services 5 sectors and deliberately only focus on Customer experience research

Industry advisors

We have Australia's largest benchmarking dataset for the utilities sector including the DNSP segment of the Energy value chain

Customer Centric

We are agile, responsive and focused on your needs

Safe, Quality Assured

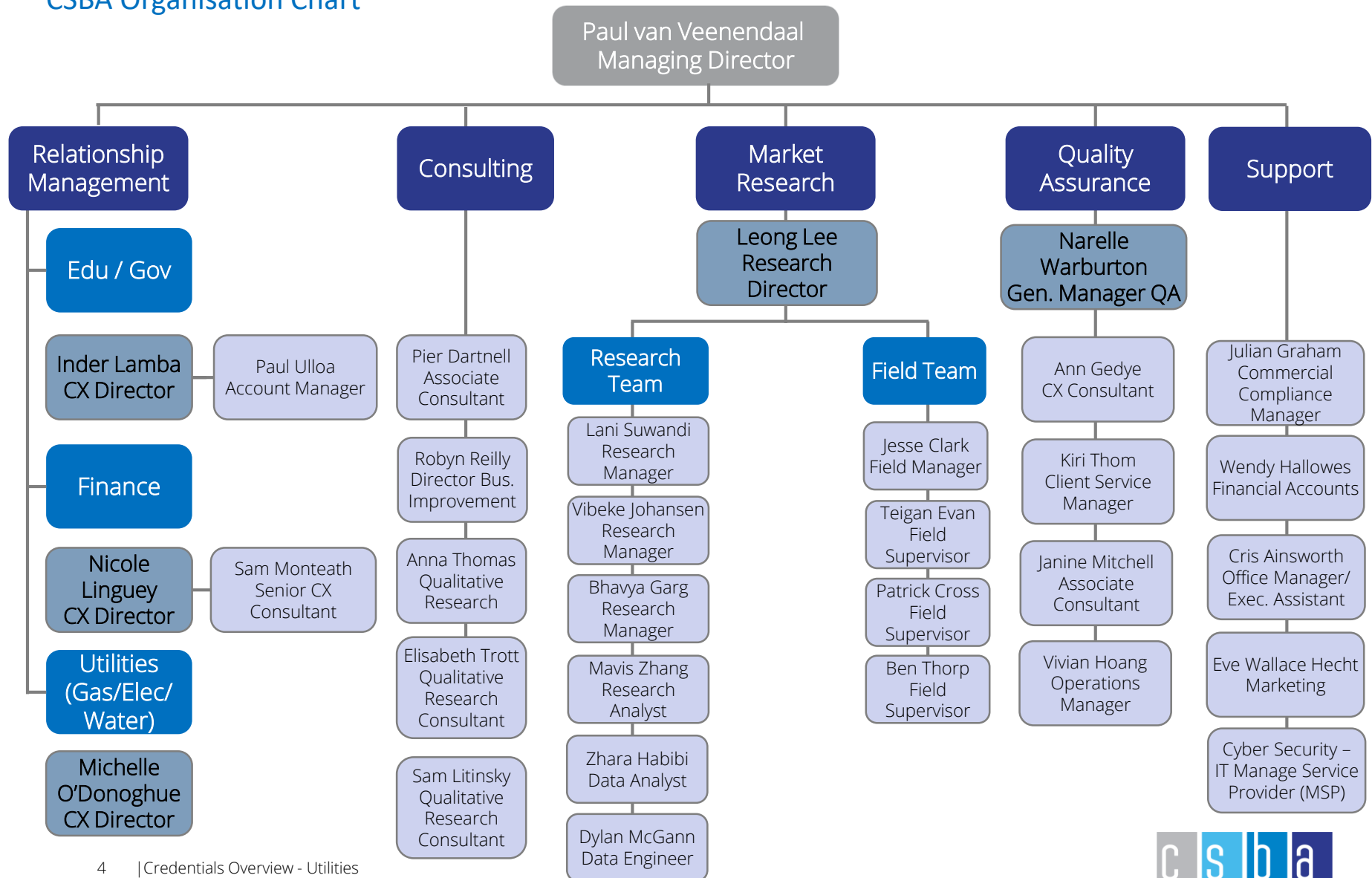
We have industry accreditations and certifications that mean your customer data is safe and your results are quality assured

Value driven

We focus relentlessly on delivering return on your investment

CSBA has dedicated resources to bring any program to life

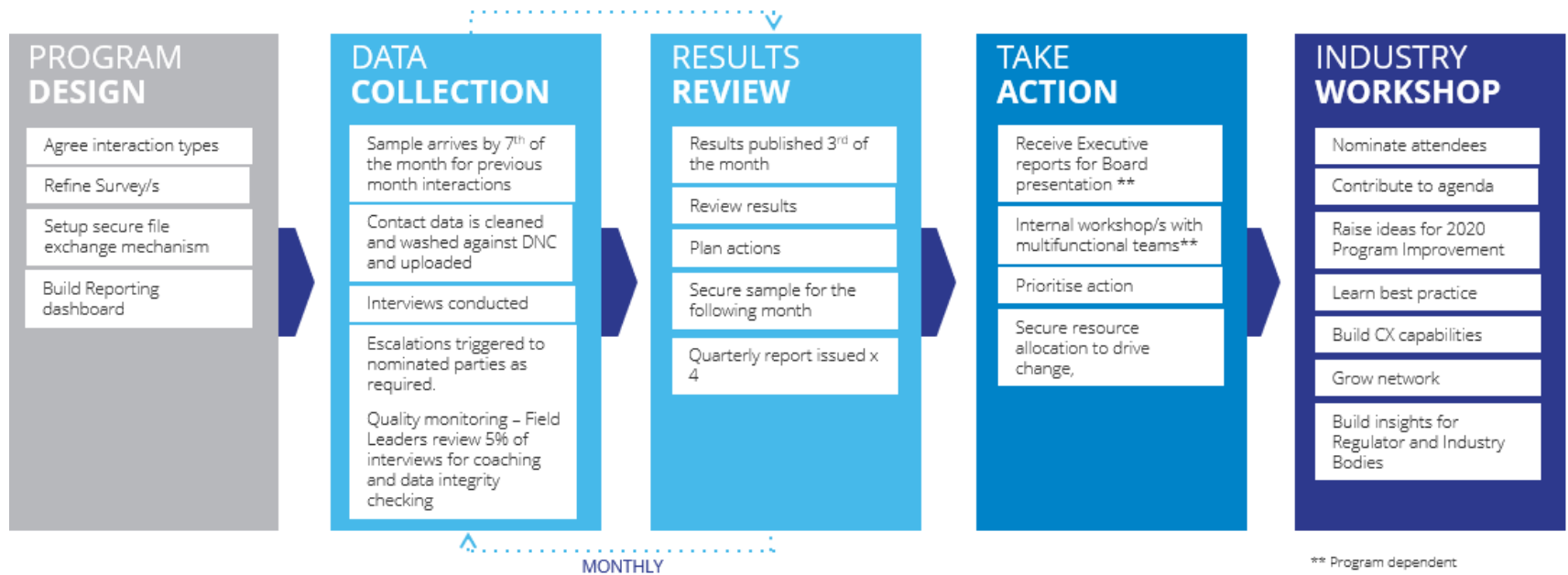
CSBA Organisation Chart



Effective methodology and proven process – with quality assurance baked in

Overview of the Energy Benchmarking program process

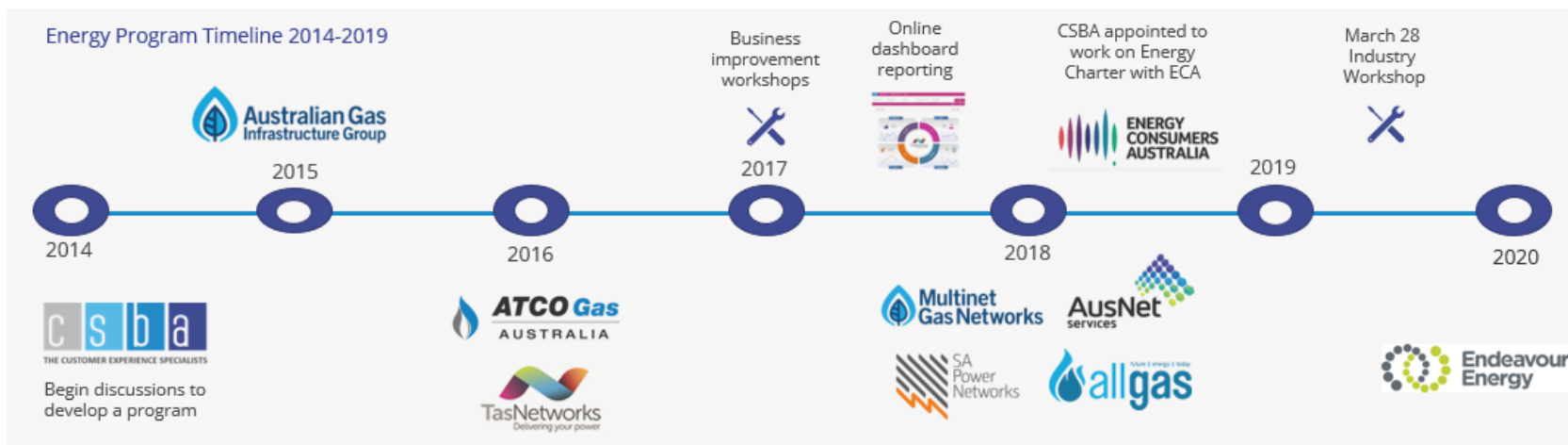
The program has been carefully designed and evolved to provide timely information that drives momentum and allows for a constant and ongoing customer feedback loop. The burden on internal resources is minimal, as the CSBA team does all the heavy lifting.



Growing and evolving in partnership with the Energy sector

Overview of program evolution

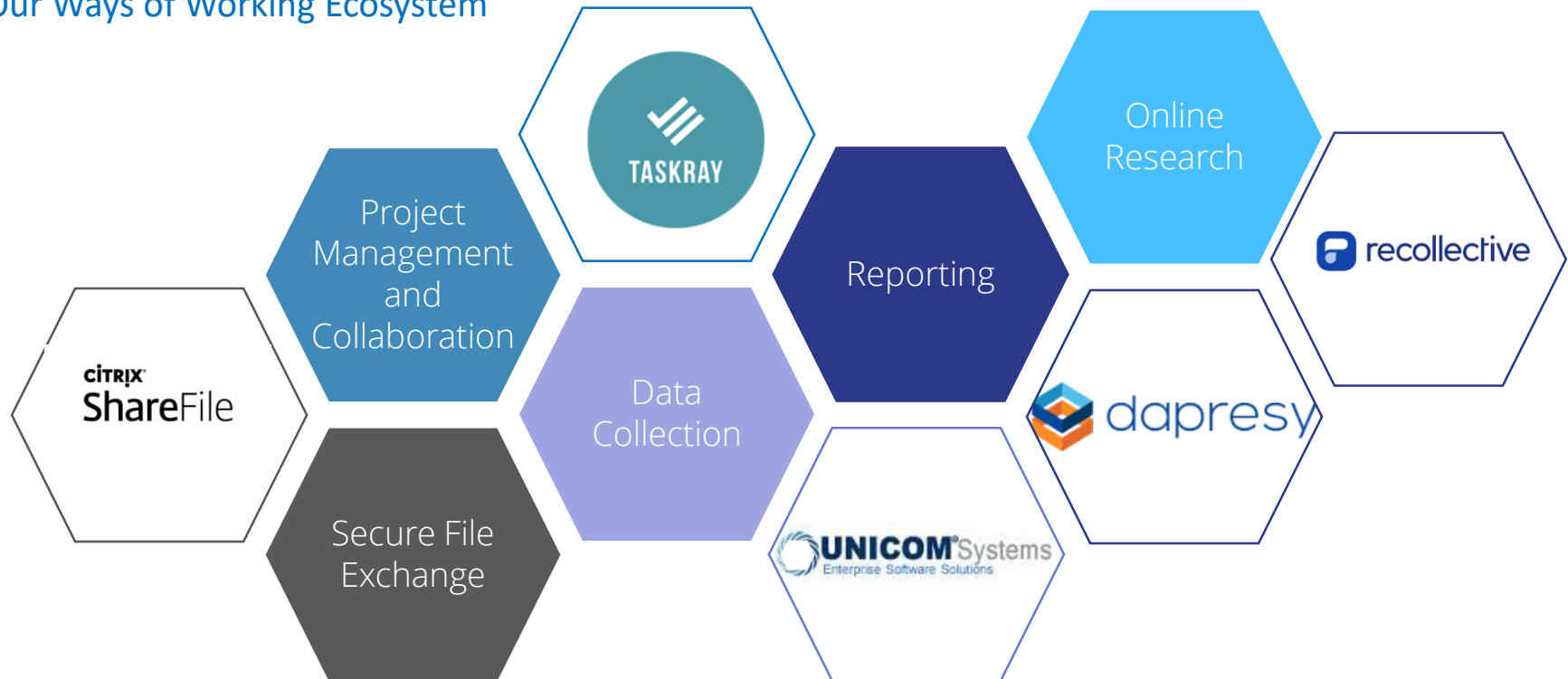
Over the last five years the program has grown and evolved from a simple idea, into a best-practice industry benchmarking program. A program where participants are now collaborating and joining forces to drive the direction of the sector.



- In 2015, AGN began looking for an independent and robust methodology to measure customer satisfaction. The objective being to instill a culture of business improvement and setting a new direction in pricing determination following a similar program in the UK.
- First round review of benchmarking results with AGN and ATCO happened in July 2017. Objective was to gain consistency in measures, and methodology.
- CSBA introduced online reporting portal creating faster access to results and flexibility in reporting design
- Multinet, Ausnet (electricity and gas) SA Power Networks, join in 2018. allgas pilots but stays out of benchmark until 2020
- During 2018 the Energy Consumers association invited CSBA to work with them on the Energy Charter.
- Renewables added as a Category in 2019
- Participants align on the formation of an Industry workshop in March. International best practise to be showcased.
- General enquiries added as new Interaction type
- Endeavour Energy joins in July 2019.

Our ecosystem is designed to protect customer data while fostering efficient, timely collaboration between clients, research participants and CSBA

Our Ways of Working Ecosystem



Project Management; We use Taskray PM – we can share project timelines, screen share, collaborate on documents easily
Secure file exchange; Our partner is Citrix Sharefile – encrypted mechanism by which we exchange private/confidential data and reports
Online Research Platform; We will work with the Recollective platform to recruit, retain and engage with participants in online forums
Data collection; Our field team uses Unicom (formerly IBM) to manage sample/quota, conduct interviews and store responses
Reporting and Exception Management; We will upload your results into Dapresy as our preferred Research Dashboard solution

CSBA takes privacy seriously

Privacy Officer role

CSBA is in business to provide valuable business intelligence to its clients. It generally does this by collecting primary data from customers and potential customers or service users of our clients. The main means by which this data is captured is via a survey, however, observing and noting behaviour and conducting individual personal in-depth interviews and focus groups (collectively considered to be qualitative research techniques) are also used.

As this information is captured from individuals, there are generally some types of identifiers included, such as a phone number or an e-mail address, which are considered personally identifiable.

CSBA is a member of the market research industry body the Association of Market and Social Research Organisations (AMSRO). As such CSBA complies with the industry Privacy Code which is a set of self-imposed standards that are higher than those required by law under the Privacy Act. We are the only industry that has had its Code registered with the Privacy Commissioner and it supersedes the Privacy Act for members of AMSRO. A copy of the Privacy Code can be found on their website (www.amsro.com.au).

All of CSBA's analysis and reporting is conducted at a whole of market level and we never release individuals' responses except where they have expressly and explicitly asked us to do so - for example to escalate a service issue they may have experienced.

AMSRO
ASSOCIATION OF MARKET AND SOCIAL RESEARCH ORGANISATIONS



Where customer contact details are provided by a client, access to this information is restricted to our data processing team. All lists are deleted automatically from our shared folders within 90 days and personal information loaded onto our data collection software, is de-identified within 12 months of fieldwork being completed.

CSBA has a Privacy Officer whose role is to ensure CSBA meets all its privacy obligations and this includes but is not limited to conducting privacy audits of our systems, liaising with our clients and ensuring every project has a Privacy Impact Assessment performed on it.

CSBA welcomes any questions you may have regarding privacy.

CSBA aligns with ISO standards for data security



ISO Accreditation is underway

There are a number of facets to CSBA's Information Security approach.

A large component of CSBA's approach is ensuring our people are fully aware of all elements of Information Security. We do this by running Privacy training twice a year for all staff as well as ensuring our Acceptable IT Use Policy is provided to staff twice a year.

All projects have a Privacy Impact Assessment conducted. This ensures all projects and project managers have privacy and data security reviewed regularly by our Privacy Officer with coaching provided if deficiencies are identified.

All client/customer data transfers take place using Citrix ShareFile over Secure FTP. These data transfers are encrypted using AES256-bit-encryption. All data is purged from ShareFile after 35 days.

All information on CSBA systems is given an Information Category and treated with the appropriate security requirements. Access to information on CSBA's systems is limited to only those people needing access.

Physical security consists of all visitors needing to sign in at reception and ensuring they are supervised at all times.

CSBA undergoes regular vulnerability and penetration testing to further understand and expose risks with the objective of flaws when identified, pre-empting security breaches and rectifying.

CSBA utilises the IBM Cloud as its survey software host. These servers are located in Melbourne with backup located in Sydney. IBM Cloud is ISO 27001 and ISO 27017 compliant.

All data captured by CSBA including survey responses and sample files remain in Australia.

Our Australian based call centre is experienced in the utilities sector and achieves best practise response rates

Call Centre Operations

Key Statistics

CSBA Interviewer Pool:

- 16 seat call centre based in Queen Street, Melbourne
- Operating Mon-Fri 9:00-21:00 and Sat 10:00-17:00
- Access to >35 experienced interviewers
- 3 rotating Supervisors
- Call centre staff conditions and wages are as per NUW and AMSRO Market & Social Research Industry Agreement 2017-2020.

Our approach to Quality

- Our quality processes are as per ISO 20252 (Market & Social Research) standards.
- We monitor a minimum of 5% of each project per month, based on individual criteria across accuracy, probing skills and professionalism.
- All interviewers are coached individually throughout the course of every shift on quality and performance measures.
- Full observations are conducted per interviewer, with a comprehensive written report provided, once within their first three projects, then twice annually.



Our approach to Training & Recognition

- We provide a briefing before commencement of every project
- We focus on quality of verbatim capture through focussed training
- We have an award scheme in place that recognises quality, efficiency and adherence to values
- We have a peer recognition scheme that drives alignment and accountability

We have partnered with many leading Australian utilities

Our valued Utility Sector Partners





Michelle O'Donoghue

CX Director



t. 03 9605 4937 m. 0411 242 010



michelle.odonoghue@csba.com.au

www.csba.com.au

