

Customer Hardship Calls

Benchmarking Research 2013
prepared for the
Australian Energy Regulator



FINAL REPORT

NOVEMBER 2013

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Introduction

About this project

The AER commissioned CSBA to undertake this 'mystery shopper' research project to better understand the experience of customers who contact their energy retailer about difficulty paying their energy bill. The research also tested whether there was any difference in the handling of calls about hardship issues compared to general enquiry calls.

The research will form part of the AER's 2012–13 Retail Markets Performance Report.

CSBA is a specialist in customer service assessment and has undertaken similar research for Victoria's Essential Services Commission.

How retailers were selected

The survey was undertaken in the three jurisdictions that had commenced the National Energy Retail Law by 30 June 2013 (Tasmania, the ACT and South Australia).

All energy retailers with an active presence in the residential customer markets of these jurisdictions were considered for the survey.

However, retailers that had a very small customer base were excluded to prevent the mystery shopping research from being detected.

Project objectives

- ***To assess the manner in which energy retailers deal with hardship-related calls***
- ***To review whether there is any difference between the handling of Hardship and General calls***

Retailers included in the research

- The following nine retailers were included in the research:
 - ActewAGL
 - Aurora Energy
 - Powerdirect
 - AGL (SA)
 - Lumo Energy
 - Simply Energy
 - Alinta Energy
 - Origin Energy
 - EnergyAustralia

Survey size

The original methodology provided for a total call quota of 890 calls. Of this, 690 calls were allocated as Hardship Calls and 200 were General Enquiry Calls. General Enquiry calls were included for benchmarking purposes.

The AER proposed a call distribution which approximately reflected the relative customer base of each retailer across the three jurisdictions:

- The larger retailers, AGL (SA), EnergyAustralia and Origin, were allocated between 135 and 140 Hardship Calls.
- The mid-sized retailers, ActewAGL, Aurora and Simply Energy, were allocated between 60 and 70 Hardship Calls.
- The smaller retailers, Powerdirect, Lumo Energy and Alinta Energy, were allocated between 30 and 35 hardship calls.
- The General Calls were spread across all retailers, with each allocated between 15 and 25 calls.
- Due to a change in the methodology for EnergyAustralia after survey commencement (see page 7), the actual total number of calls reported on as part of this research was 795 (630 Hardship and 165 General Calls).

Survey process

- CSBA mystery shoppers telephoned the selected energy retailers between 29 July and 12 September 2013 (approximately six weeks). Calls were made from CSBA's office in Melbourne during retailer business hours.
- As is a feature of the mystery shopping technique, CSBA callers represented themselves as a customer of the retailer and assessed the retailer's performance in responding to their enquiries and/or concerns. Examples of the scenarios used to guide CSBA callers are in Appendices 1 and 2.
- Performance of energy retailers' Agents was rated using CSBA's Telephone Customer Service Assessment Criteria (see Appendix 3).
- CSBA's standard methodology provides for a Maximum Wait Time of four minutes (including ring, IVR and queue time). If a call is not answered within four minutes, the call is terminated. Terminated calls contribute to the total number of calls and count towards the call Connect Time. The proportion of terminated calls is also factored into each of the three index scores.
- It is generally common for retailers to request a customer's account number or other personal details to respond fully to the customer's queries or issues. This information cannot be provided by a mystery shopper, which is a noted limitation of this research. However the 'soft skills' of the Agent who answers the call can still be assessed and compared. The accuracy of information about services and products is not assessed.

What is mystery shopping?

"Mystery shopping studies involve the use of mystery shoppers who are trained and briefed to observe, experience and measure any customer service process by acting as a prospective customer and undertaking a series of pre-determined tasks to assess performance against specific criteria, reporting back on their experiences in a comparable and consistent way."

Change to methodology for EnergyAustralia

- CSBA mystery shoppers experienced substantial difficulty in getting through to EnergyAustralia during the first few weeks of the survey ,with only 5 of 106 calls connecting to an Agent within the maximum four minute wait time.
- To increase the probability of completing some calls, the AER and CSBA agreed to extend the Maximum Wait Time to eight minutes for EnergyAustralia and reduce the planned call quota to 60 with a focus only on Hardship Calls from that point. (Four General Enquiry Calls had been completed, but this was an insufficient sample to be included.)
- This extended wait time of eight minutes means EnergyAustralia's calls and performance results are not directly comparable with the results of other retailers that were subject to the standard wait time of four minutes. This is because a longer wait time increases the probability of a call being successfully connected to an Agent, and call success rates are a key factor in the overall scores for all three indices. However, a decision was made to still report the results for EnergyAustralia at the eight minute wait time, to at least report on its scores at the level of individual measure.
- We are also mindful that EnergyAustralia results are based on a relatively small number of calls, which also makes it difficult to directly compare its performance to that of other retailers.
- Therefore, EnergyAustralia scores and performance were not included in the Retailers Average calculations.

CSBA Methodology

Assessment Criteria and Performance Indices

CSBA's Overall Performance Index

The criteria that energy retailers are assessed against

The **Performance Index** is how CSBA measures the customer experience.

Every call (see next page for further detail) is assessed against a number of criteria. Scores are combined into two indices, **Getting Through** and **Service Delivery**. The sum of these scores gives a total score for **Overall Performance**.

Note:

The index scores are based on weighted calculations and will therefore not appear to have a direct relationship with scores for the individual measures.

At the individual measure level, scores are based on connected calls only. However, scores at the index level consider the proportion of calls terminated after the Maximum Wait Time was reached.

OVERALL PERFORMANCE (200)

GETTING THROUGH (100)

SERVICE DELIVERY (100)

Connect Time (60)

Agent Manner (50)

Ring
IVR
Queue Time

Warm, Interested & Helpful /
Businesslike/un-emotive

Greeting Skills (40)

Enquiry Resolution Skills (50)

Salutation
Company Name
Agent Name
Offer to Help
Sign Off

Clarified Needs
Good Product Knowledge
Clear Resolution to Query
Courteous & Helpful

Communication Skills are considered to be important but not essential to the success of a call. Therefore, Communication Skills are assessed, but are not included in the calculation of the Overall Performance Index.

Communication Skills

Matched Speech
Correct Grammar
Patient & Tolerant
Avoided Interrupting
Developed Rapport
Maintained Contact
Projected Confidence
Avoided Slang/Jargon

CSBA Methodology

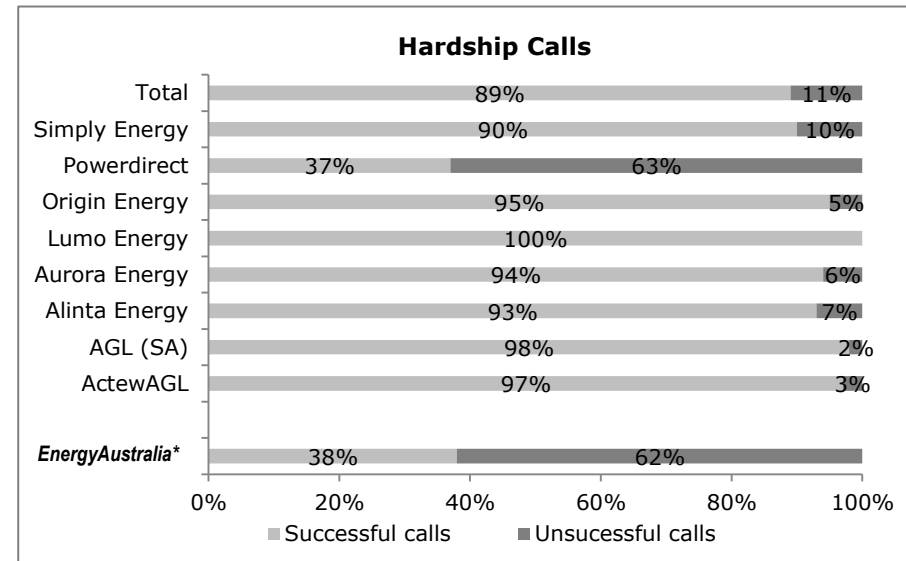
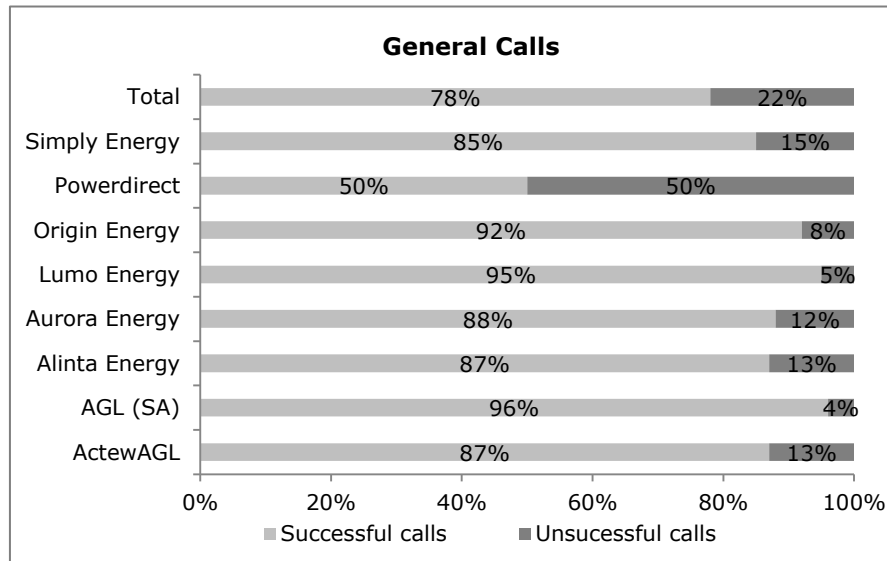
Performance Indices – Unsuccessful Calls and Successful Calls

Attempted Calls and Completed Calls

A fundamental aspect of CSBA's methodology is the inclusion of 'unsuccessful' calls in our assessment of customer service. CSBA believes that a customer's ability to get through to a retailer is an important factor in the overall customer experience. The charts below therefore show the proportion of successful and unsuccessful calls for each retailer.

The Overall Performance, Getting Through and Service Delivery indices are based on all calls made to the retailers:

- **Successful calls** are included in the Connect Time calculation and scored for each other measure within the Getting Through and Service Delivery indices.
- **Unsuccessful calls** (calls that exceed CSBA's Maximum Wait Time of four minutes) are included in the calculations for Connect Time and the Getting Through and Service Delivery indices. However, unsuccessful calls are not included in the scores for individual measures.



*Maximum Wait Time for Hardship Calls to EnergyAustralia was extended to 480 seconds.

CSBA Methodology

Background to the Approach

Assessment criteria: Customer expectation research

In order to assist with questionnaire development and analysis results, CSBA conducts group interviews. Group interviews continue to indicate the following core customer expectations when contacting enquiry centres:

- Phones should preferably be answered by a 'human being' within 30 seconds of the first ring.
- Recorded messages are generally not liked, including IVR systems that required the customer to enter a number of keystrokes to reach the required area.
- Agent should, in most instances, be able to resolve the matter without transferring to another Agent.
- Components of a greeting including salutation, organisation and agent name, an offer to assist, and a formal sign off were thought to be desirable; of these, use of the Agent's name was particularly desirable.
- Callers respond better to an Agent who projects an interested, warm and helpful manner.
- Providing a clear resolution at the end of the call is critical to minimising misconceptions and possible call backs.

Performance indices

The concepts of Greeting Skills and Enquiry Resolution Skills indices, and Customer Satisfaction Grids were developed exclusively by CSBA, and remain our property. The quality of Agent greeting index weightings requires the five components of the greeting to be used for a perfect score on a particular call. These components are equally weighted.

The weightings given to the various components of the Customer Satisfaction Grid were guided by the opinions of industry experts and are therefore necessarily subjective. The Getting Through axis relates to Connect Times and the Greeting Skills components; the Service Delivery axis relates to Enquiry Resolution Skills elements and Agent Manner.

Key Findings

Summary of All Results

Key Findings

Hardship and General Calls Compared

Connect Time for both call types was similar, with callers getting through to retailers in just under 1:40 minutes.

When the scores for general calls and hardship calls are compared at the level of Overall Performance, there is no statistical difference in the result.

Among the energy retailers, the Overall Performance delivered for Hardship Calls was in line with General Calls.

There was indicative evidence that Agents are handling some aspects of General Calls differently to Hardship Calls.

- Across General Calls the retailer Agents delivered a stronger performance for aspects of Enquiry Resolution Skills, particularly the extent to which they Clarified Needs. While the scores for this measure carried some statistical significance, it is important to acknowledge that the mystery shopping approach may play a role in the differences. With the mystery shopping approach, the degree to which an Agent can fully resolve a caller's query is limited. When the caller cannot provide actual account details, the Agents are limited in the extent to which they can fully understand the caller's context and subsequently explore relevant options for the caller.
- Agents delivered a stronger performance on General Calls for aspects of Communication Skills. More effort was spent being Patient & Tolerant with callers and on Developing Rapport with them. Again, it is important to note that the mystery shopping context may play a role in these differences, because the callers are presenting with a difficult query and are unable to provide an account number for the Agent.

Retailer performance was weaker than the wider Energy Sector.

- Compared with the Energy Sector*, the retailers delivered a lower standard of performance, both in terms of their ability to answer calls and in the quality of service delivered when calls were answered.

*Sector data sourced from CSBA Syndicated Mystery Shopping Project, Q1 July-Sep 2013. All calls were of a general enquiry nature.

Key Findings

Hardship Calls by Measure

As a 'market', the energy retailers delivered a fairly strong level of service on Hardship Calls.

- While 89% of all calls made got through to an Agent, 11% did not. Potentially this could mean that around one in ten Hardship Callers are unable to get through to their energy retailer. Difficulty getting through to retailers may result in Hardship Callers becoming demotivated to contact their retailer again.
- Typically, successful calls were connected within 98 seconds, and callers received a fairly high standard of service throughout the call.
- At the Overall level, the retailer Agents' strengths were Greeting Skills and Communication Skills.
- At the level of individual measure, items offering room for improvement were within Agent Manner, Enquiry Resolution Skills and Communication Skills.
 - Even though Total Acceptable Manner score was high across the Energy Sector (99%), the proportion of Interested, Warm and Helpful manner, which is Best Practice Manner, could be improved further from the score of 72%.
 - Two other measures received a relatively low score across the Sector:

Developed Rapport (73%) and Clarified Needs (80%). These skills, particularly for Hardship Calls, are considered crucial for easing the caller's mind and ensuring that their query is fully understood before proceeding towards resolving the query.

Key Findings

Hardship Calls by Retailer

Overall Performance Index

- The high performing retailers were ActewAGL and AGL (SA), both performing well above the Retailer Average.
- Retailers that performed above the Retailers Average were Aurora Energy, Origin Energy and Lumo Energy.
- Simply Energy was on par with the Retailers Average.
- Trailing behind the Retailers Average was Alinta Energy (only by a small margin) and Powerdirect.
- *Energy Australia received low Index scores due to their high proportion of unsuccessful calls*

Note:

The ratio of successful to unsuccessful calls impacts on each retailer's index scores. A high volume of unsuccessful calls results in weaker scores for the Getting Through, Service Delivery and Overall Performance indices.

Results by Key Measure

- **Connect Time:** While the average Connect Time was 98 seconds, connecting to an Agent was easier at some retailers than others.
 - Fastest Connect Time was at ActewAGL (61sec).
 - Slowest Connect Time was at Powerdirect (196sec).
- **Greeting Skills:** The Energy Sector achieved a high average of 98%, meaning that generally Agents are opening calls with a Salutation, introducing the Company Name, offering their own Agent Name, making an Offer to Help, and concluding the call with some sort of goodbye or Sign Off.
 - Strongest performers with near perfect scores were ActewAGL, AGL (SA), Aurora Energy and Lumo Energy.
 - Weakest performances were observed for Origin Energy and Simply Energy.

Key Findings

Hardship Calls by Retailer (cont'd)

- **Agent Manner:** The Energy Sector achieved a high average of 99%, meaning that Agents used an Acceptable Manner in almost every call. (Within the CSBA framework, both Interested, Warm and Helpful and Businesslike, and Unemotive are deemed 'acceptable' – however, Best Practice Manner is Interested, Warm and Helpful only.)
 - Special mention goes to AGL (SA) where Agents used Best Practice Manner across nine in ten calls.
 - Lowest use of Best Practice Manner was observed at Lumo, Simply Energy and Alinta.
- **Enquiry Resolution:** The Energy Sector achieved an Average of 86%, with retailers delivering a fairly strong performance across the individual measures.
 - Strongest performers with scores of 90% or 91% were ActewAGL, Aurora Energy and Powerdirect.
 - Weakest performers were Lumo, Simply Energy and Alinta.
 - Clarified Needs (80%) was the lowest individual measure within Enquiry Resolution, with all retailers showing room for improvement.
- **Communication Skills:** Again, the Energy Sector achieved an Average of 91%, with retailers generally delivering a strong performance on most measures.
 - Strongest performers were ActewAGL and AGL (SA).
 - Weakest performance was delivered by Lumo (10 points behind the Retailers Average).
 - Within Communication Skills, scores for two measures were notably lower than others:
 - Patient and Tolerant: Agents at Lumo and Alinta showed room to improve.
 - Developed Rapport: Whilst ActewAGL and AGL (SA) performed well, all retailers could improve their efforts in Developing Rapport with callers.

Key Findings

Hardship Calls by Retailer (cont'd)

Results for Energy Australia are not comparable to the other retailers due to the extended Maximum Wait Time (8min) used for Energy Australia during fieldwork. The result for Energy Australia is summarised below.

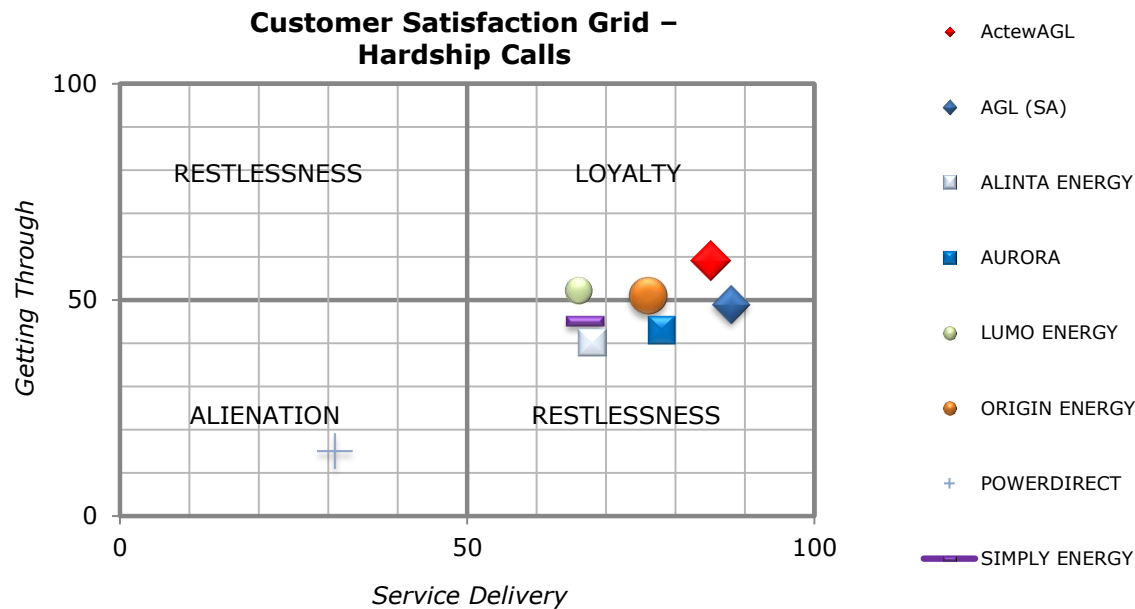
- Despite the extended Wait Time, 62% of calls to Energy Australia were unsuccessful (did not connect to an agent). As a result their Scores within the Overall Performance Index were low.
- Of the successful calls, the average connect time was around 6 minutes (357 sec).

Despite difficulty connecting to Energy Australia, when they did get through, callers received a very high level of service.

- Agents at Energy Australia delivered very good service across all aspects of the calls.
- At the level of individual measure, Agents at EnergyAustralia performed very well on all measures within Greeting Skills (99% Ave.), Agent Manner (100% Ave.), Enquiry Resolution (94%) and Communication Skills (97% Ave.).

Key Findings

Customer Satisfaction



The Customer Satisfaction Grid plots the Getting Through and Service Delivery indices. This provides a snapshot of the degree to which the service experience is enhancing, maintaining or weakening customers' relationships with their retailers.

- Stronger performers among the retailers include ActewAGL, AGL (SA), Lumo Energy and Origin Energy.
- Weaker performers were Aurora, Simply Energy, Alinta and Powerdirect:
 - Hardship Callers may be questioning the value of service being delivered by their retailer, and be feeling anxious and unsure about whether their retailer can assist them with their hardship issues.

Key Findings

Key Measures by Retailer

Hardship Calls	All Surveyed Retailers Ave. (excl EA)	ActewAGL	AGL (SA)	ALINTA ENERGY	AURORA ENERGY	LUMO ENERGY	ORIGIN ENERGY (SA)	POWER DIRECT	SIMPLY ENERGY	ENERGY AUSTRALIA*
Average Connect Time (sec)	98	61	79	119	107	74	71	196	94	357
GREETING SKILLS %										
<i>Ave. Greeting Skills</i>	98	98	99	94	99	99	90	92	90	99
Salutation	98	93	96	100	100	100	93	100	99	100
Company Name	91	100	100	100	100	100	69	92	64	100
Agent Name	99	99	100	100	94	100	100	100	100	100
Offer to Help	90	97	98	77	95	100	90	69	92	95
Sign Off	99	100	100	100	100	97	99	100	97	100
AGENT MANNER %										
<i>Total Acceptable Manner</i>	99	98	100	98	99	97	98	100	98	100
Interested, Warm & Helpful	72	83	89	67	74	57	72	69	64	94
Businesslike & Unemotive	27	16	11	32	25	40	26	31	34	6
ENQUIRY RESOLUTION SKILLS %										
<i>Ave. Enquiry Resolution</i>	86	91	89	84	90	73	86	91	83	94
Clarified Needs	80	86	83	79	78	67	83	80	83	97
Good Product Knowledge	90	97	91	87	96	77	86	100	89	92
Clear Resolution to Query	87	91	91	86	93	72	87	100	78	92
Courteous & Helpful	86	93	93	83	91	74	87	82	82	95
INDEX SCORES										
Overall Performance	114	144	137	108	121	118	127	46	112	78
Getting Through	44	59	49	40	43	52	51	15	45	25
Service Delivery	70	85	88	68	78	66	76	31	67	53
CALL SUCCESS RATE %										
Successful calls (connected in <4min)	89	97	98	93	94	100	95	37	90	38
Unsuccessful calls (exceeded max wait time of 4 min)	11	3	2	7	6	-	5	63	10	62

Note: Lowest score for each measure is highlighted orange. and the highest score is highlighted in green.

*Calls to EnergyAustralia were based on an 8 min. wait time. Refer to Methodology for more information.

Key Findings

Key Measures by Retailer (cont'd)

Hardship Calls	All Surveyed Retailers Ave. (excl EA)	ActewAGL	AGL (SA)	ALINTA ENERGY	AURORA ENERGY	LUMO ENERGY	ORIGIN ENERGY (SA)	POWER DIRECT	SIMPLY ENERGY	ENERGY AUSTRALIA
COMMUNICATION SKILLS %										
Ave. Communication Skills	91	97	95	89	93	81	91	93	90	97
Matched Speech	91	99	93	95	93	76	93	88	92	100
Correct Grammar	99	100	100	100	100	93	100	100	99	97
Patient & Tolerant	85	91	92	77	87	67	88	94	87	98
Avoided Interrupting	93	99	95	93	97	87	92	88	92	100
Developed Rapport	73	92	88	69	72	51	75	72	68	94
Maintained Contact	96	100	99	92	99	92	92	100	95	95
Projected Confidence	92	96	94	92	97	85	89	100	88	95
Avoided Slang/Jargon	99	100	100	98	99	93	100	100	100	100

Note: Lowest score for each measure is highlighted orange, and the highest score is highlighted in green.

Part 1 – Hardship and General Calls Compared

All Retailers

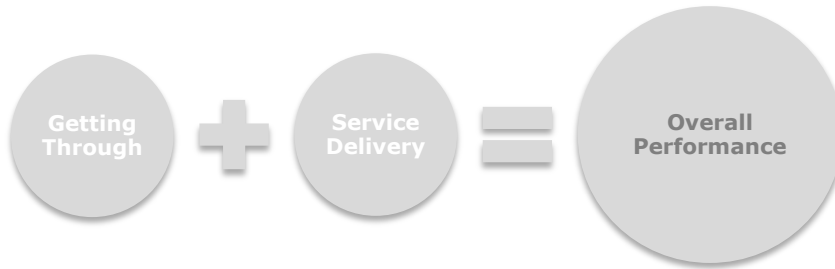
This section of the report examines the results at the aggregate call level to compare performance of General Calls against Hardship Calls.

Notes:

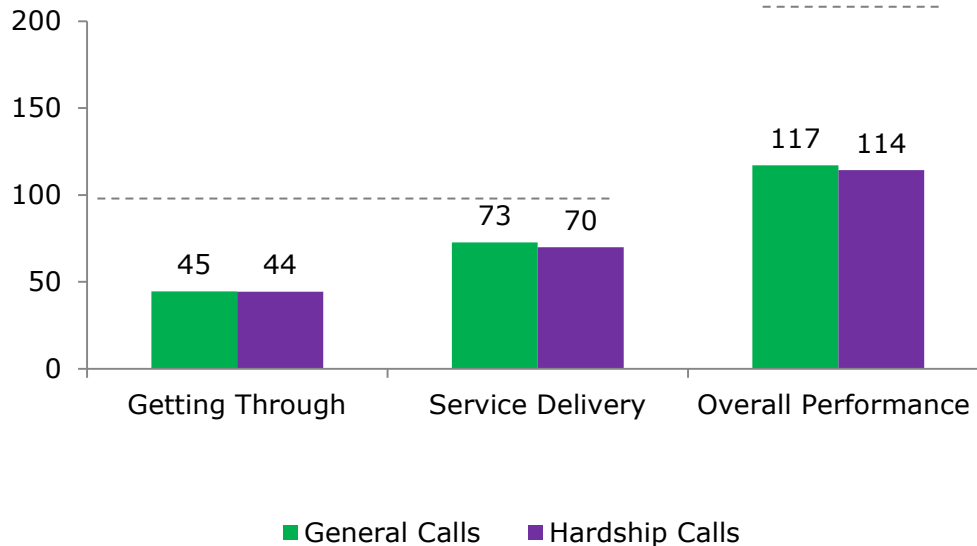
- Due to the adjustment in methodology for EnergyAustralia, its results are not included in this section of the report.
- The Overall Performance, Getting Through and Service Delivery indices are based on all calls made to the retailers:
 - Successful calls are included in the Connect Time calculation and scored for each other measure within the Getting Through and Service Delivery indices.
 - Unsuccessful calls (calls that exceeded CSBA's Maximum Wait Time of four minutes) are included in the calculations for Connect Time and the Getting Through and Service Delivery indices. However, unsuccessful calls are not included in the scores for individual measures.

Hardship and General Calls

Overall Performance



Overall Performance Index – All Retailers



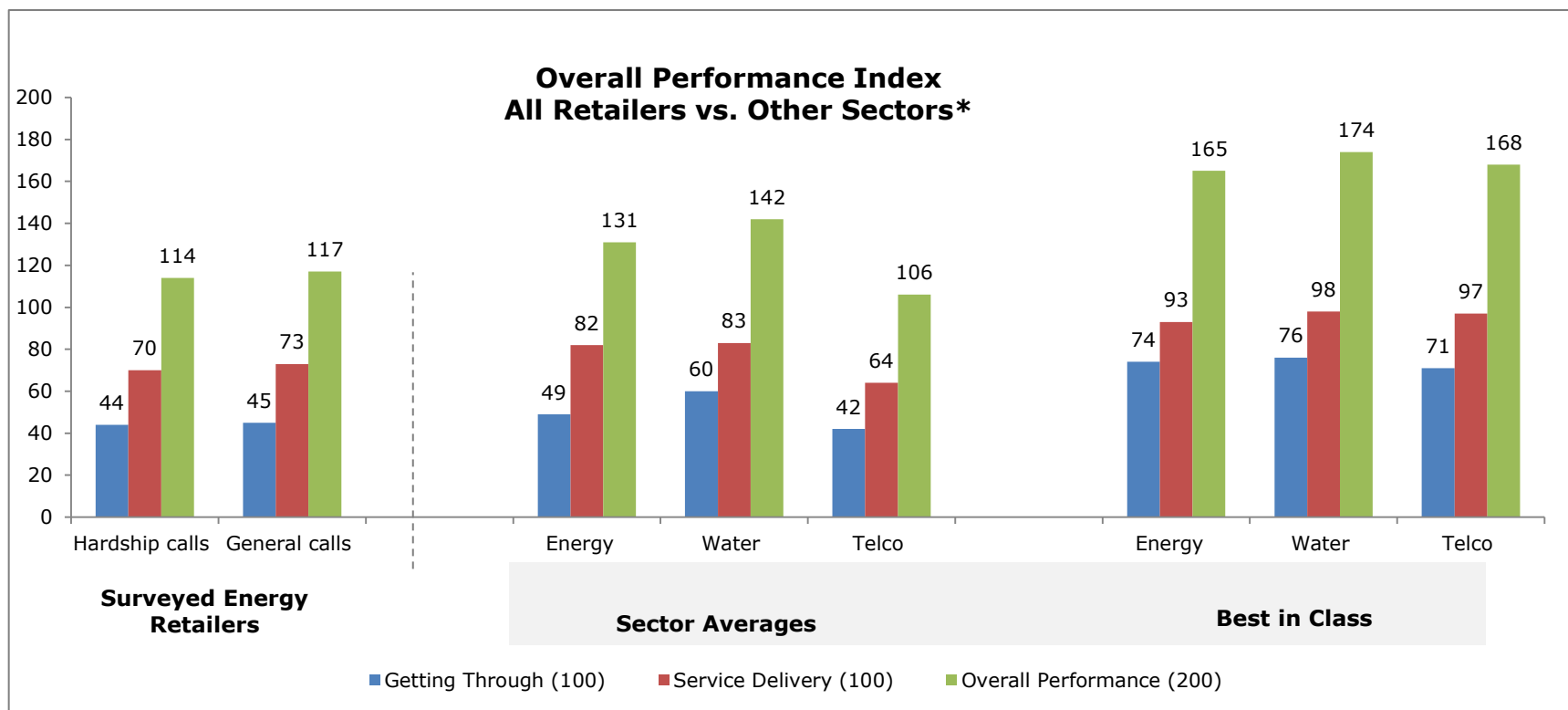
The results indicate there is no difference in the way that energy retailers manage Hardship Calls as compared to General Calls at an overall level.

- While there were very small differences across the scores, these results were not statistically significant.
- Within the Service Delivery Index, there were some notable differences between how retailers performed on these measures.
- No differences should be expected within the Getting Through Index, as these measures are assessed before the mystery shopper explained the purpose of their call.

Note: T tests were conducted on the data, confirming that at the overall level, there was no statistical difference between the call type results.

Hardship and General Calls

Overall Performance Compared to Other Sectors



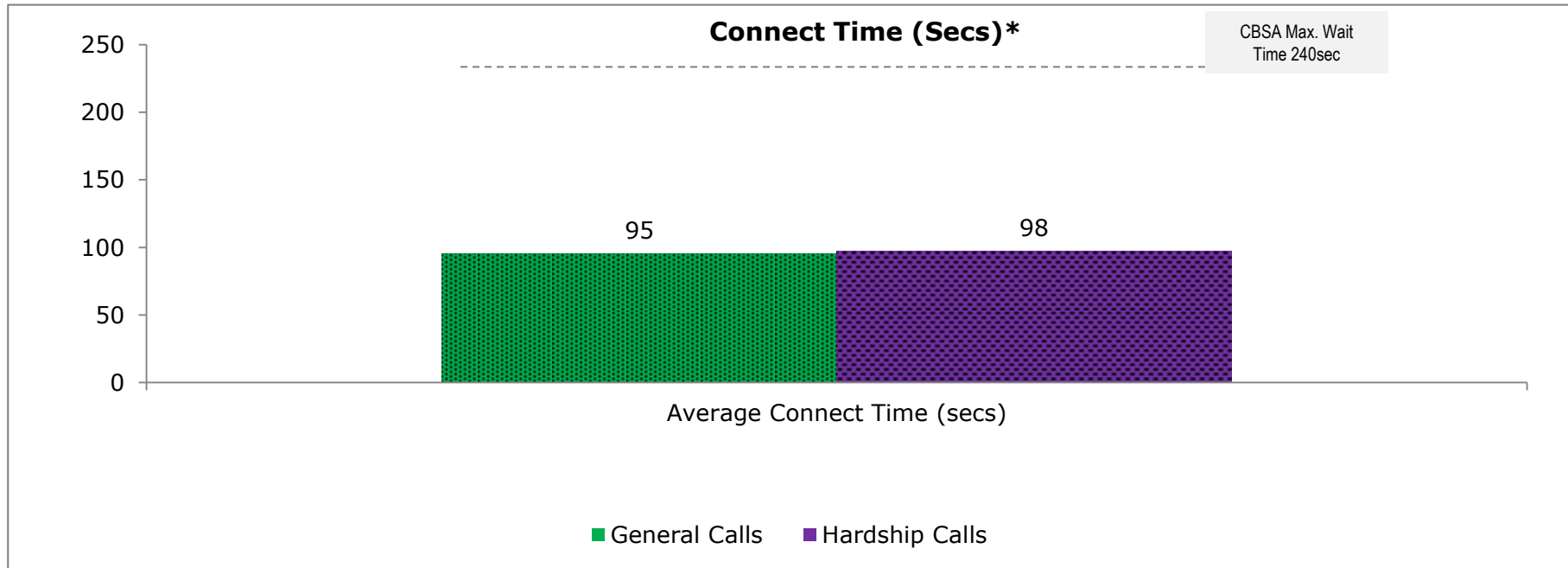
For additional context, the energy retailers' performance was compared with results from CSBA's Syndicated Mystery Shopping Project.

The retailers generally performed below the standard of the wider Energy Sector and the Water Sector.

*Sector data is sourced from CSBA Syndicated Mystery Shopping Project, Q1 July-Sep 2013. All calls were of a general enquiry nature. 'Energy' refers to a sample of energy retailers across Australia, including some of the retailers surveyed for the current project.

Hardship and General Calls

Getting Through: Connect Time



On average across all calls made, callers were waiting just under 1:40 minutes (or 100 seconds) to speak to an operator.

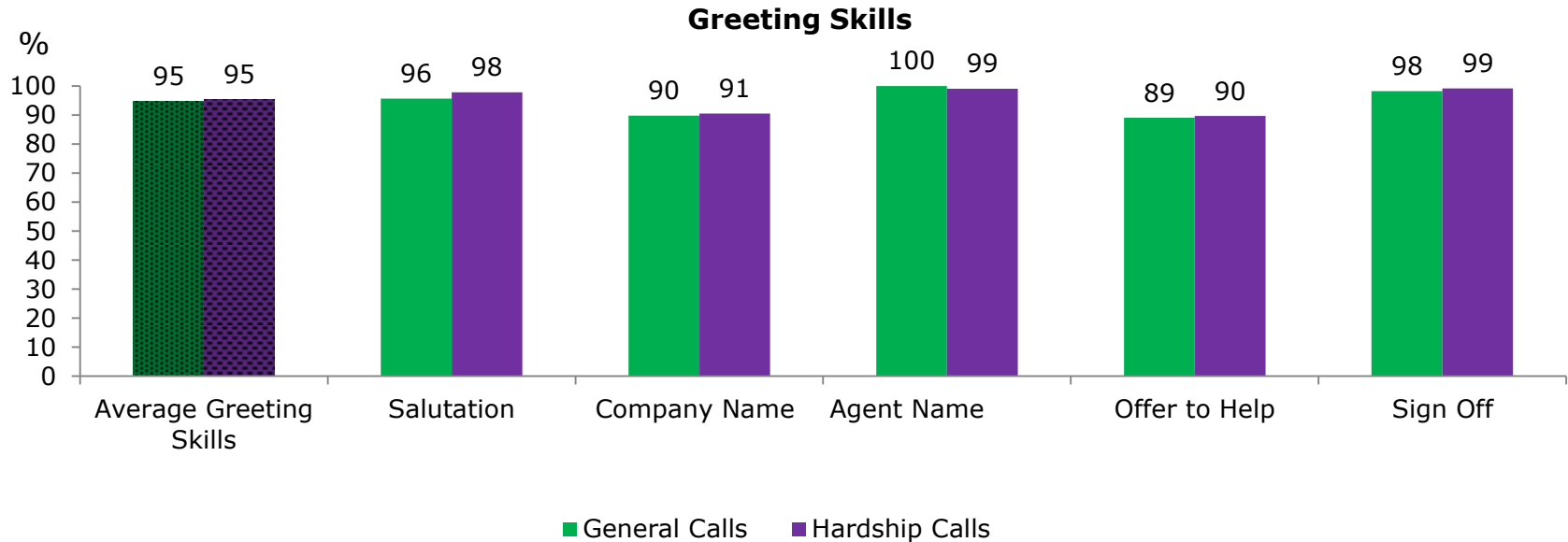
Calculation of the CSBA indices are based on all calls made to the retailers. The Connect Time average includes:

- unsuccessful calls (that exceeded four min. wait time) – these are given a 'connect time' of 241 seconds
 - successful calls are allocated a connect time based on the total time taken from dialling the number, IVR time and any time spent on hold.
- The above chart does not include calls made to EnergyAustralia where a Maximum Wait Time of eight minutes was applied (to Hardship Calls). At this wait time, EnergyAustralia had an average connect time of 357 seconds.

No differences in Connect Time should be expected between the call types, as Connect Time is independent of the purpose of the call.

Hardship and General Calls

Getting Through: Greeting Skills



Energy retailers performed well across all measures in the Greeting Skills criteria.

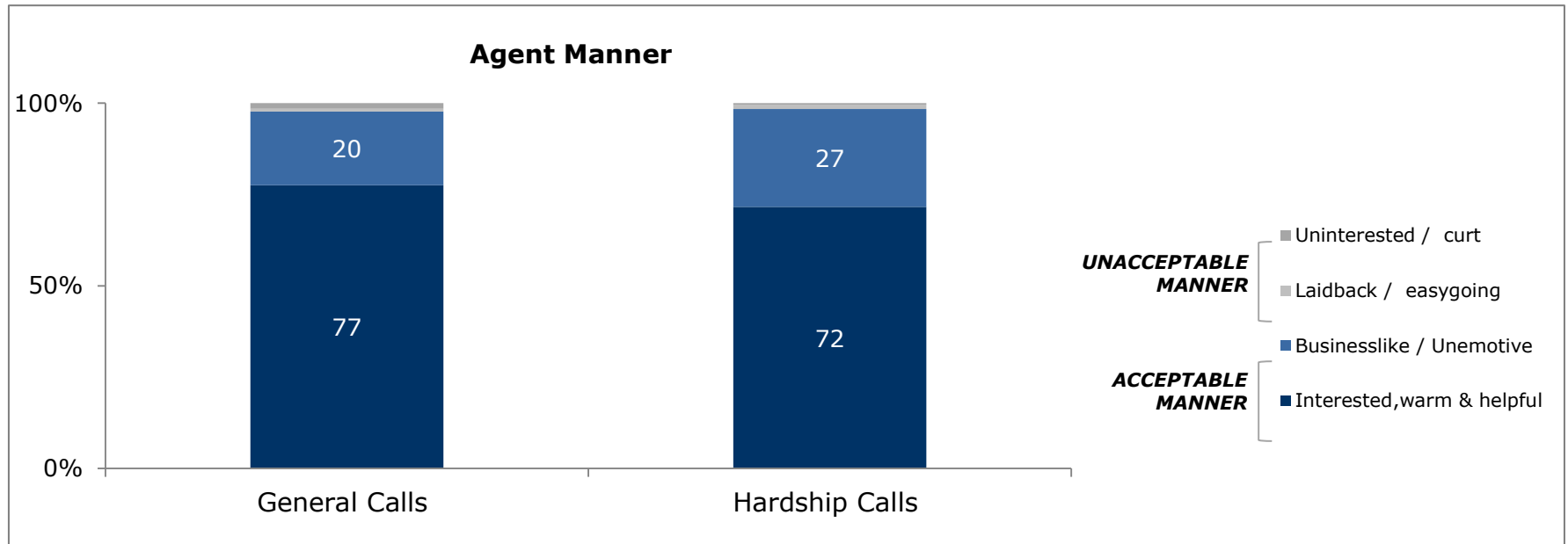
In nearly all instances, Agents provided a salutation, their Agent Name, and included an appropriate Sign Off at the end of the call.

While still scoring highly, Agents did not always provide their Company Name or clearly Offer to Help.

No differences between Hardship Calls and General Calls should be expected across Greeting Skills measures, as this is independent of the purpose of the call.

Hardship and General Calls

Service Delivery: Agent Manner



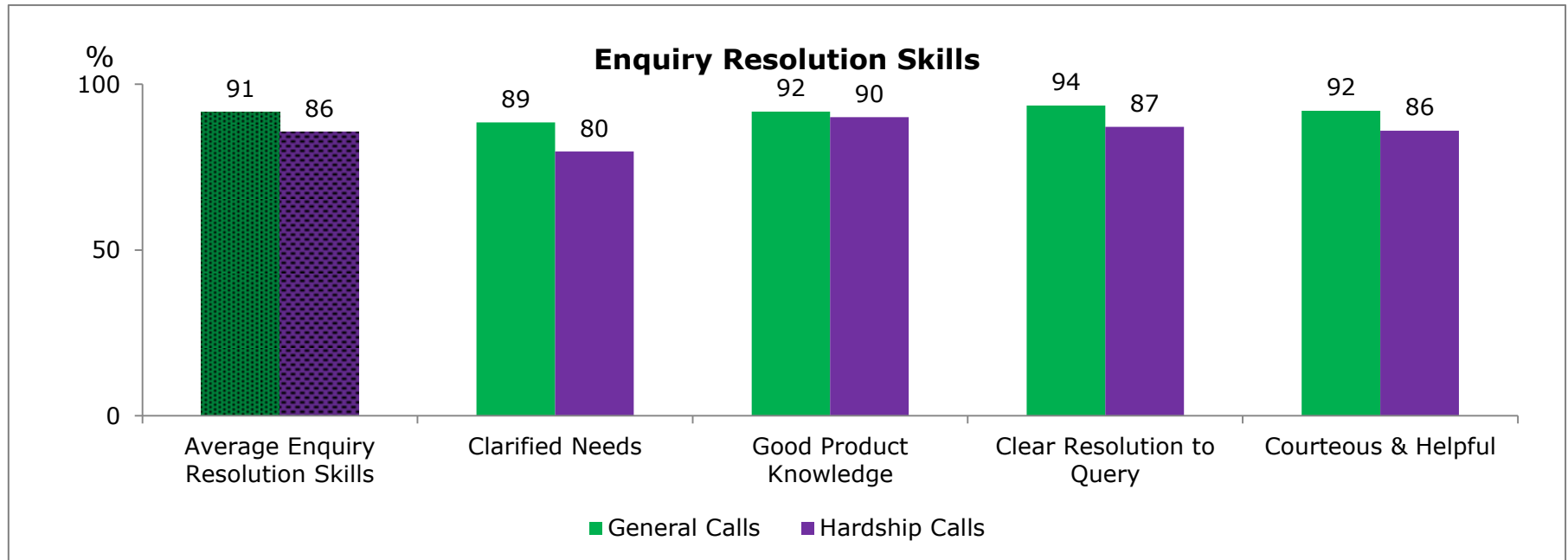
In nearly all calls, retailers were assessed as having an acceptable manner.

CSBA recommends Interested, Warm and Helpful as Best Practice Agent Manner. Therefore, in the assessment of a call, higher scores are awarded for this measure than for Businesslike and Unemotive.

- Callers experienced an Agent that had an Acceptable Manner in 97% of General Calls and 99% of Hardship Calls, which is a very positive finding. The difference between call types is small and not statistically significant.
- An Acceptable Manner is either being Interested, Warm and Helpful OR Businesslike and Unemotive. The majority of callers experienced an Agent that was Interested, Warm and Helpful. Agents that were more Businesslike and Unemotive was slightly higher for Hardship Calls, but this difference was again not large enough to be significant.
- Under three percent of callers experienced an Agent that had an Unacceptable Manner (i.e. Laidback/Easygoing or Uninterested/Curt).

Hardship and General Calls

Service Delivery: Enquiry Resolution Skills

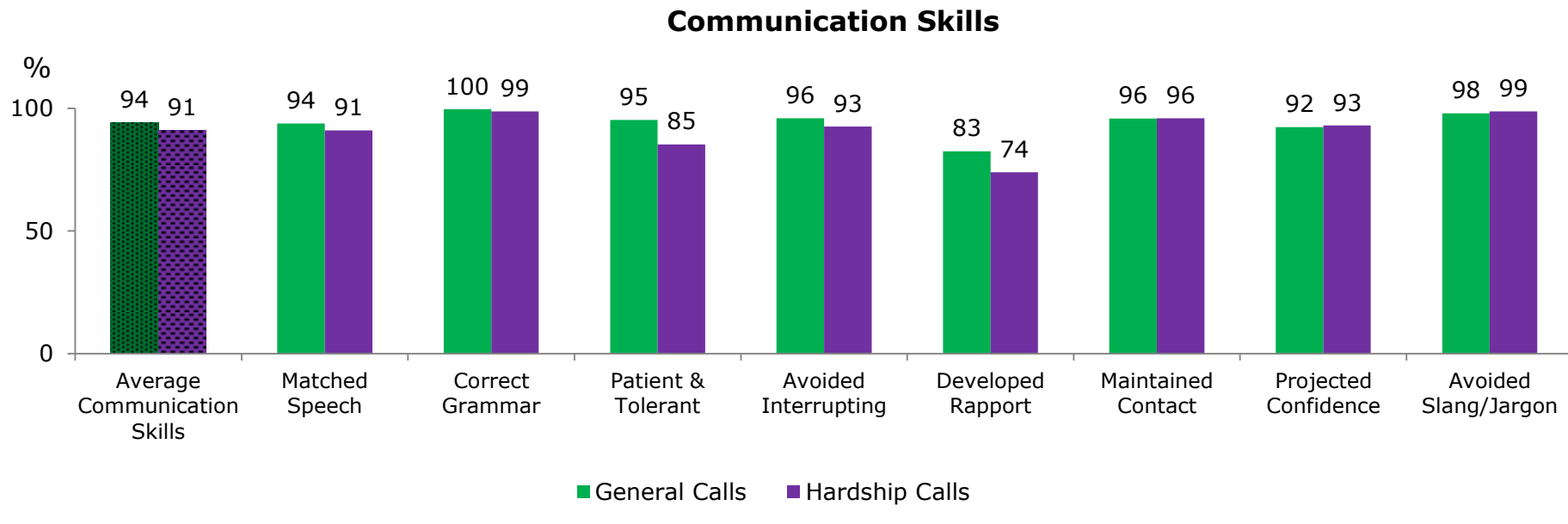


Retailers were generally very good at understanding callers' enquiries and providing a satisfactory resolution.

- Across all measures, General Calls recorded a slightly higher score. Although the differences are not large enough to be significant (with the exception of Clarified Needs), this may be indicative of the limitations of the mystery shopper approach. That is, Agents may have found it more challenging to fully resolve a caller's enquiries when the caller was unable to provide account details or other identifying details.
- Clarified Needs returned the lowest scores, and the nine-point difference between General Calls and Hardship Calls is significant (at $p \leq 0.05$), indicating that Agents handling the latter may be less effective in asking probing and clarifying questions to gain a clear understanding of the enquiry and its context. Again, the research approach may not be totally indicative of a real caller's experience.
- Retailers scored highly on Good Product Knowledge, which is an encouraging finding as it indicates customers are receiving informative and unambiguous answers to their enquiries.

Hardship and General Calls

Communication Skills



Energy retailers performed highly across Communication Skills, with an average score above 90%.

- While not a contributor to the index scores, Communication Skills offers important indications as to Agents' soft skills and the general atmosphere within the contact centre.
- For most measures, there was very little difference in the scores between General Calls and Hardship Calls.
- Developed Rapport, or a connection with the customer, returned the lowest score across both call types. The score for Hardship Calls was nine points lower, which is a notable difference, but not large enough to be significant.
- While retailers performed highly on Patient and Tolerant measure for General Calls, the score was 10 points lower for Hardship Calls. This result is significant (at $p \leq 0.05$) and highlights an area that retailers could improve on.

Part 2 – Hardship Calls

Retailers Compared by Measure

This section of the report drills down into the results for Hardship Calls to understand and compare how these calls are being handled by the retailers.

Notes:

- The Overall Performance, Getting Through and Service Delivery indices, are based on all calls made to the retailers:
 - Successful calls are included in the Connect Time calculation and scored for each other measure within the Getting Through and Service Delivery indices.
 - Unsuccessful calls (calls that exceed CSBA's Maximum Wait Time of four minutes) are included in the calculations for Connect Time and the Getting Through and Service Delivery indices. However, unsuccessful calls are not included in the scores for individual measures.

Getting Through

This section presents scores for the Getting Through Index.

The Getting Through Index is comprised of Connect Time and Greeting Skills.

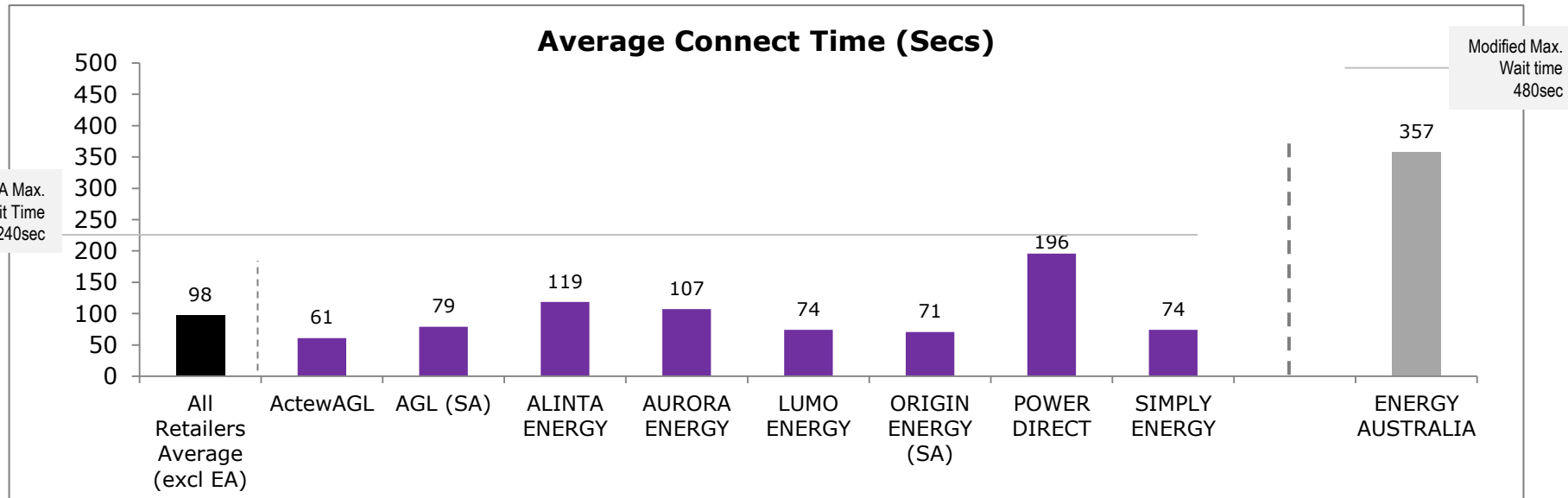
- Connect Time
- Greeting Skills
 - Salutation
 - Company Name
 - Agent Name
 - Offer to Help
 - Sign Off

Note:

Results for EnergyAustralia are presented on the following pages – however, due to the extended wait time for calls made to EnergyAustralia, its results cannot be directly compared to the results for other retailers.

Hardship Calls

Getting Through: Connect Time



Of all calls made to the retailers, 89% were connected and 11% exceeded the Maximum Wait Time of four minutes.

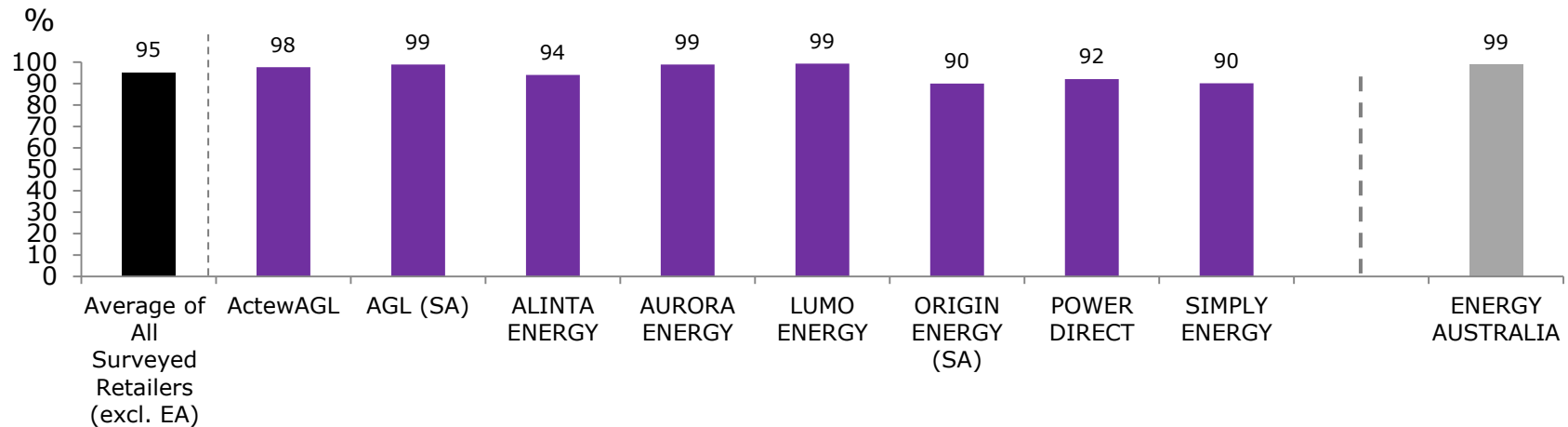
On average, across all calls attempted, it took callers 1:38 minutes (98 seconds) from the time they dialled to the time they spoke to an Agent.

- ActewAGL had the quickest average call connect time at 1:01 minutes (or 61 seconds).
- Excluding EnergyAustralia, Powerdirect had the longest connect time at 3:16 minutes (196 seconds).
- Lumo Energy, Origin Energy and Simply Energy had similar average connect times of between 1:11 and 1:14 minutes (71–74 seconds).
- A Maximum Wait Time of eight minutes was used for EnergyAustralia – its average connect time was 5:57 minutes (357 seconds), which was considerably slower than other retailers.

Hardship Calls

Getting Through: Greeting Skills

Average Greeting Skills

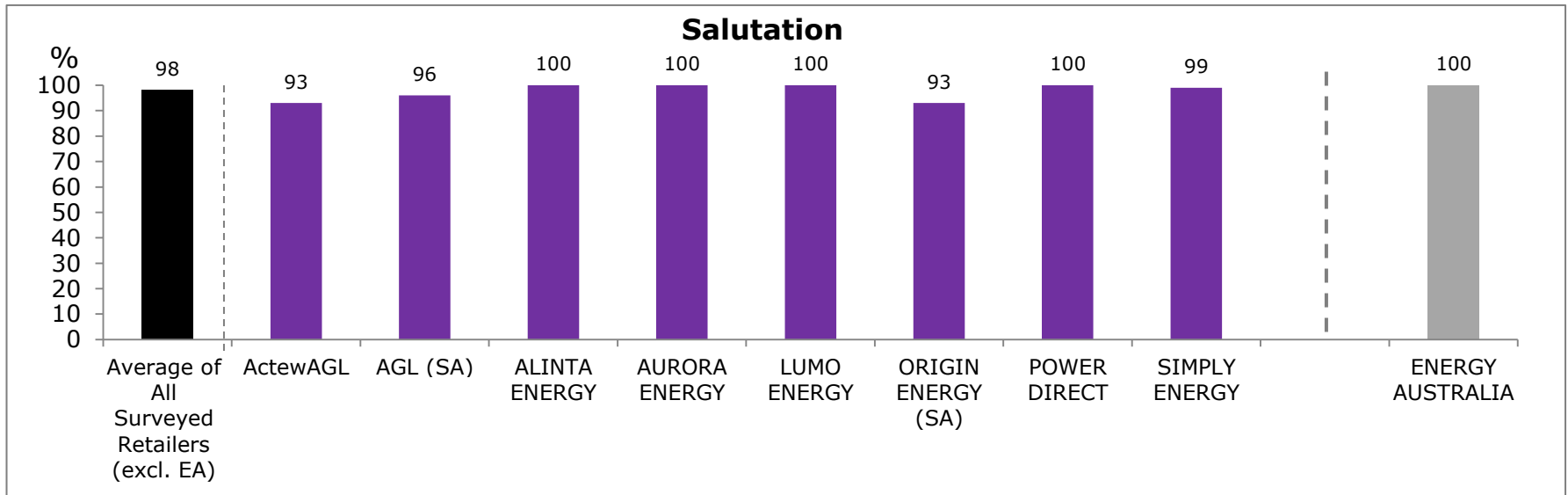


Callers rated energy retailers very well for *Greeting Skills*. Average Greeting Skills across all measures was 95%, with all retailers scoring at or above 90%.

- The near perfect scores of 98% and 99% were given to Agents from ActewAGL, AGL (SA), Aurora Energy and Lumo Energy.
- Whilst Origin Energy and Simply Energy performed well across all individual measures in the Greeting Skills Index, both scored relatively less well for Company Name, which explains their lower scores of 90%.
- The individual measures of Greeting Skills are detailed on the following pages.
- *EnergyAustralia* scored 99%.

Hardship Calls

Getting Through: Greeting Skills (Salutation)

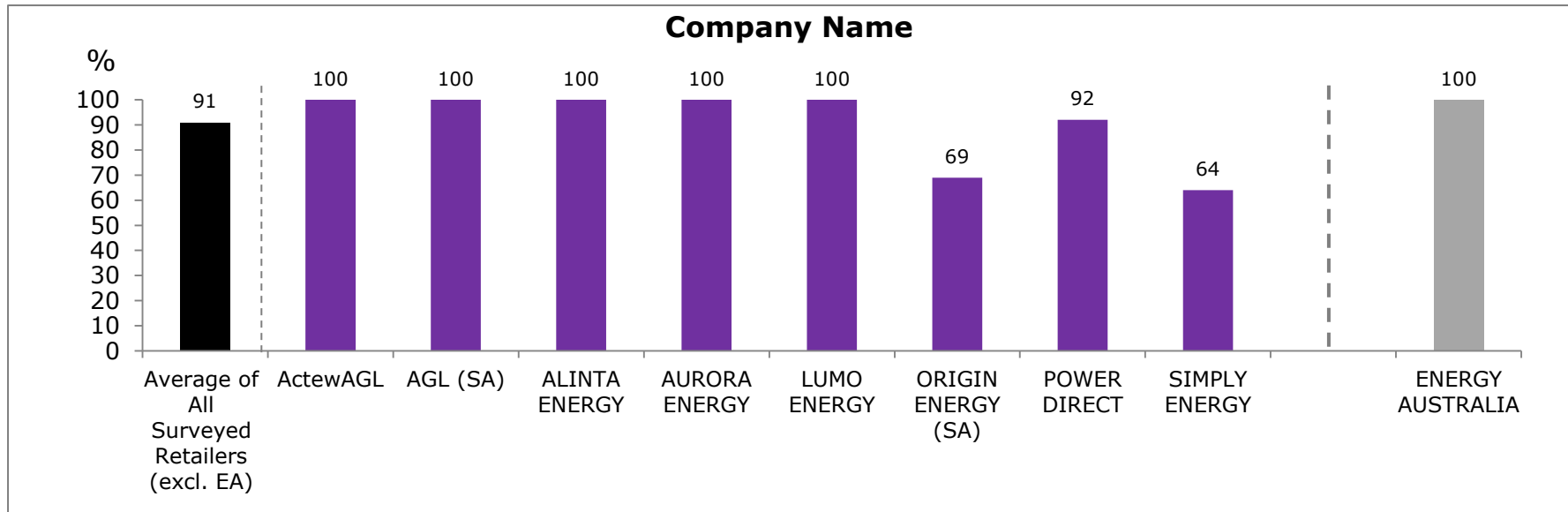


The average Salutation score for the surveyed retailers was 98%, with callers receiving an appropriate welcome on nearly every call.

- Alinta Energy, Aurora Energy, Lumo Energy and Powerdirect achieved a perfect Salutation score.
- The lowest scores were for ActewAGL and Origin Energy (93% each). While these scores were not particularly low, it is easy to ensure that each caller is greeted with an appropriate welcome, such as "Good morning" or "Welcome to ...".
- *EnergyAustralia* scored 100%.

Hardship Calls

Getting Through: Greeting Skills (Company Name)

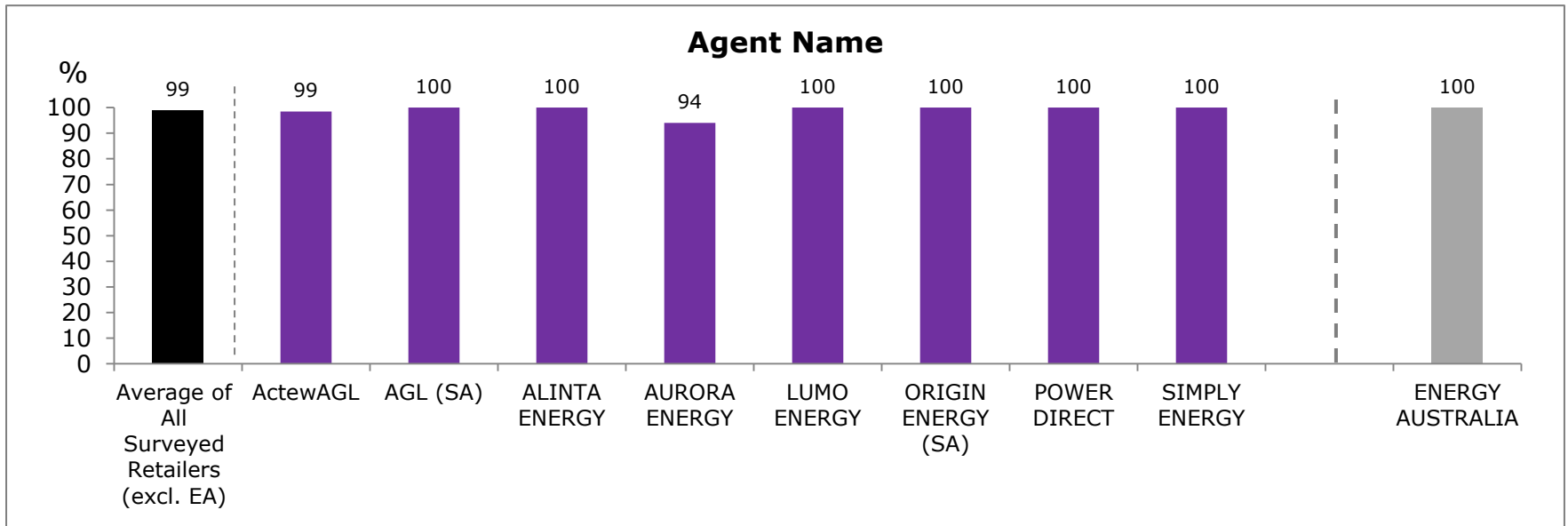


In 91% of all calls, retailer Agents provided their Company Name in their greeting. Most retailers received a perfect score, but two retailers provided their Company Name in less than 70% of calls.

- Agents at ActewAGL, AGL (SA), Alinta Energy, Aurora Energy and Lumo Energy all provided their Company Name on every occasion.
- Company Name was provided less often by Agents at Powerdirect (92%), Origin Energy (69%) and Simply Energy (64%). There is scope for these retailers' Agents to improve their service delivery by including their Company Name as part of their greeting.
- Agents at EnergyAustralia also provided their Company Name on every call.

Hardship Calls

Getting Through: Greeting Skills (Agent Name)

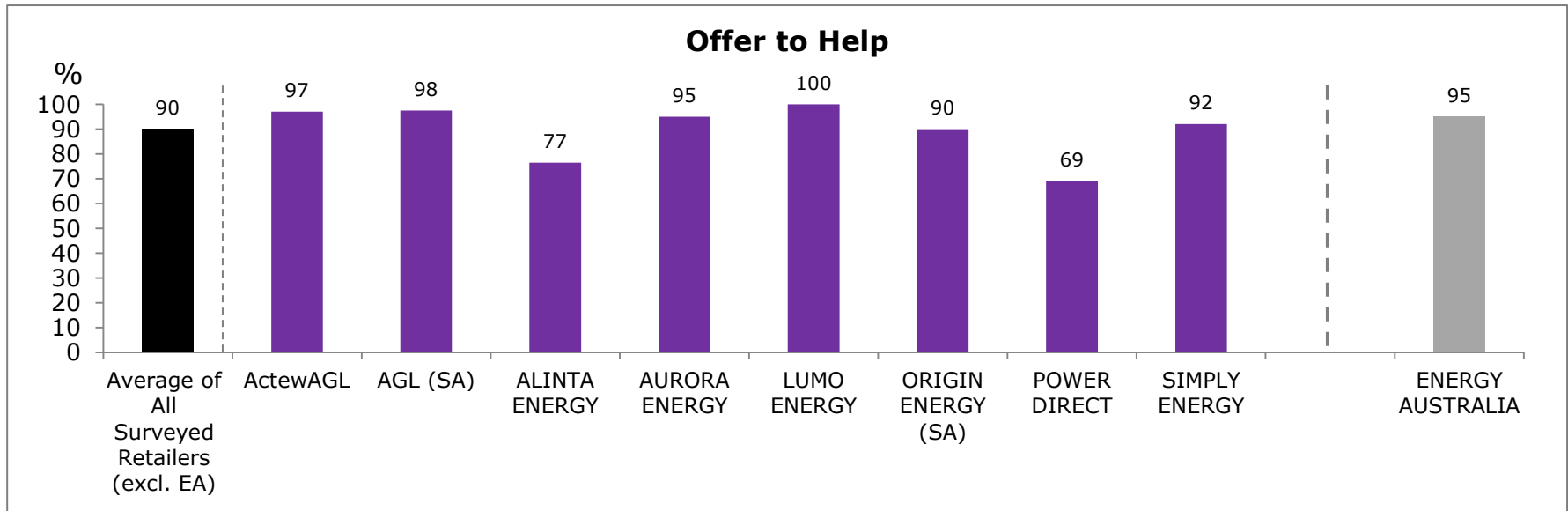


Retailer agents consistently provided their names to callers during their greeting, with a 99% success rate across the survey.

- The only two scores that were not perfect, although still high, were 99% for ActewAGL and 94% for Aurora Energy.
- *EnergyAustralia* scored a perfect 100%.

Hardship Calls

Getting Through: Greeting Skills (Offer to Help)

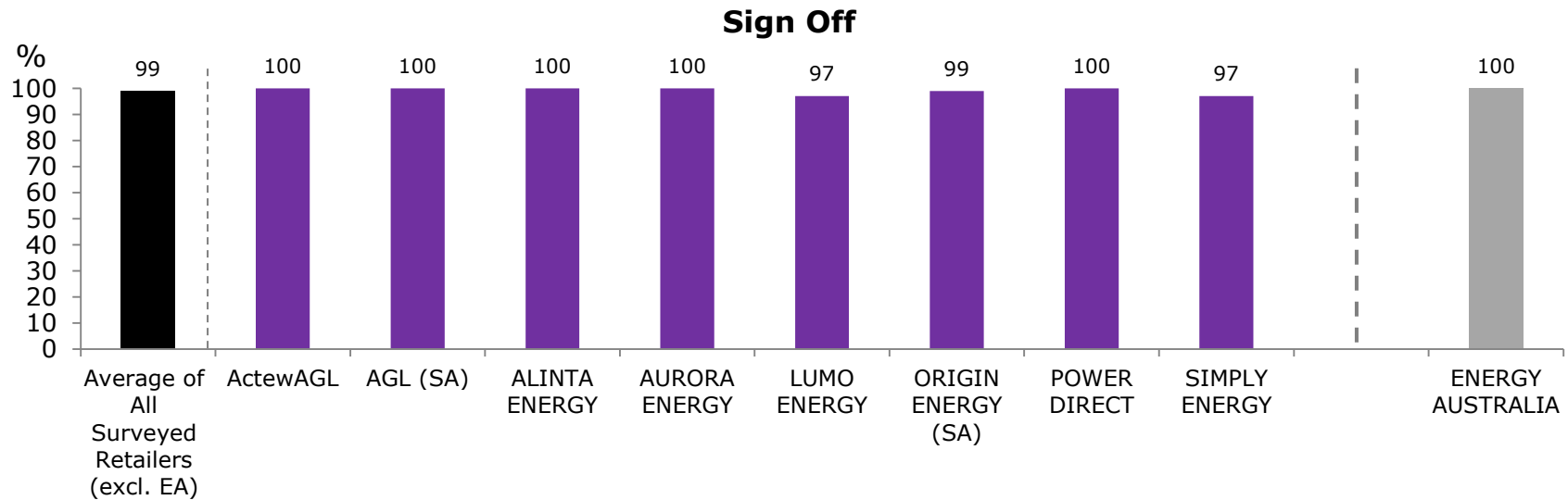


There was notable variation in scores for Offer to Help, with a range between 69% and 100%. The average across surveyed retailers was 90%.

- Lumo Energy led the retailers, with its Agents extending an Offer to Help customers on every call.
- Only Alinta Energy and Powerdirect scored below the retailer average, with Powerdirect making an Offer to Help customers during only 69% of calls.
- An Offer to Help can be as simple as “How may I help you?”, but it is an important part of customer service.
- *EnergyAustralia* scored highly at 95%.

Hardship Calls

Getting Through: Greeting Skills (Sign Off)



99% of calls were completed with an appropriate Sign Off, such as “Thanks for calling” or “Goodbye”.

- Scores for this measure were very high across all retailers, with only Lumo Energy, Simply Energy and Origin Energy not scoring 100% (at or above 97%).
- *EnergyAustralia* scored a perfect 100%.

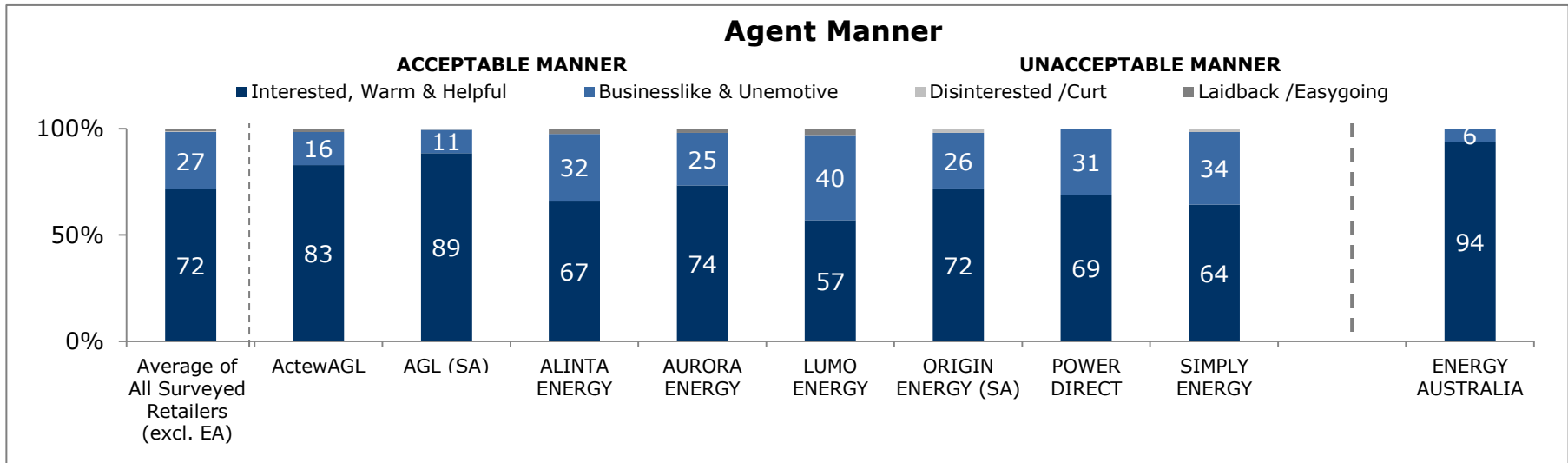
Service Delivery

This section presents retailers' scores for the Service Delivery Index. The two components of the Service Delivery Index are Agent Manner and Enquiry Resolution Skills.

- Agent Manner
 - Warm, Interested & Helpful / Businesslike & Unemotive
- Enquiry Resolution Skills
 - *Average Enquiry Resolution Skills*
 - Clarified Needs
 - Good Product Knowledge
 - Clear Resolution to Query
 - Courteous & Helpful

Hardship Calls

Service Delivery: Agent Manner

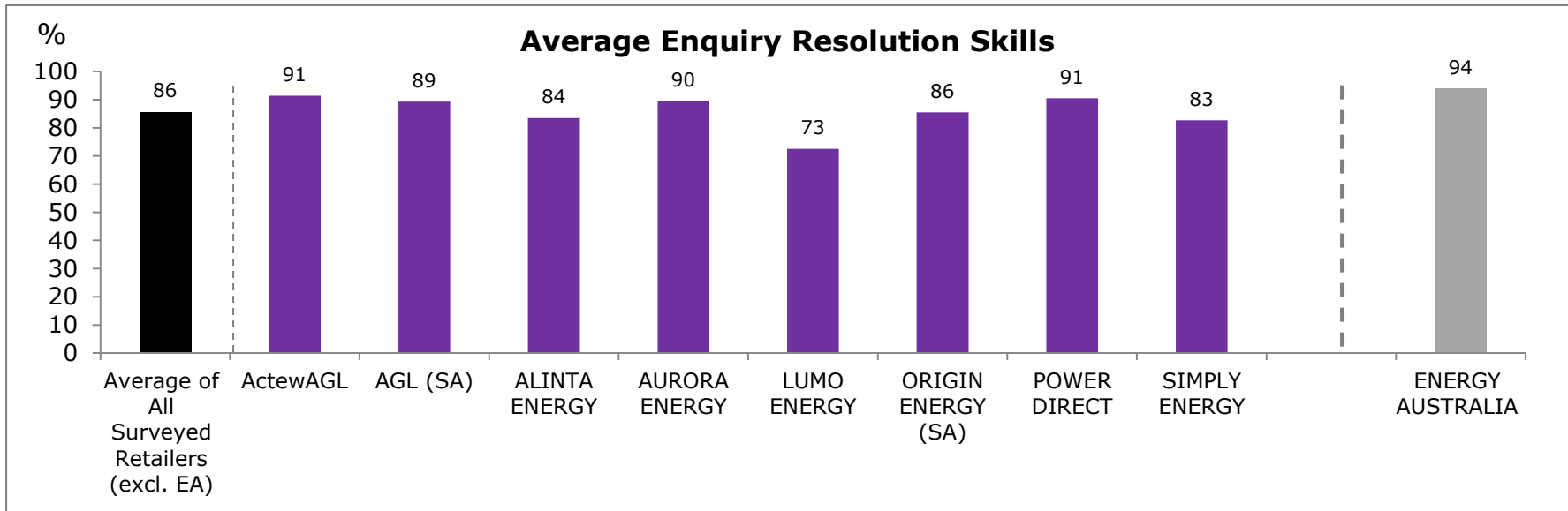


Retailers scored extremely well on Acceptable Agent Manner. The average score was a near-perfect 99%, and no retailer scored less than 97%.

- To be assessed as having an Acceptable Manner, Agents must have shown callers they were Interested, Warm and Helpful, or that they were Businesslike & Unemotive. While both manners are acceptable, the former is regarded as best practice and therefore awarded a higher score. Agents do not score if they are assessed as being Disinterested or Laidback, as customers can perceive this as being too casual or offhand.
- AGL (SA) and Powerdirect received a perfect Acceptable Manner score.
- The three retailers that most often showed Best Practice Manner (Interested, Warm and Helpful) were AGL (SA) (89%), ActewAGL (83%) and Aurora Energy (74%). Lumo Energy (57%) and Simply Energy (64%) less often adopted this approach.
- *EnergyAustralia achieved a perfect score for Acceptable Manner (94% of which was Interested, Warm and Helpful).*

Hardship Calls

Service Delivery: Enquiry Resolution Skills



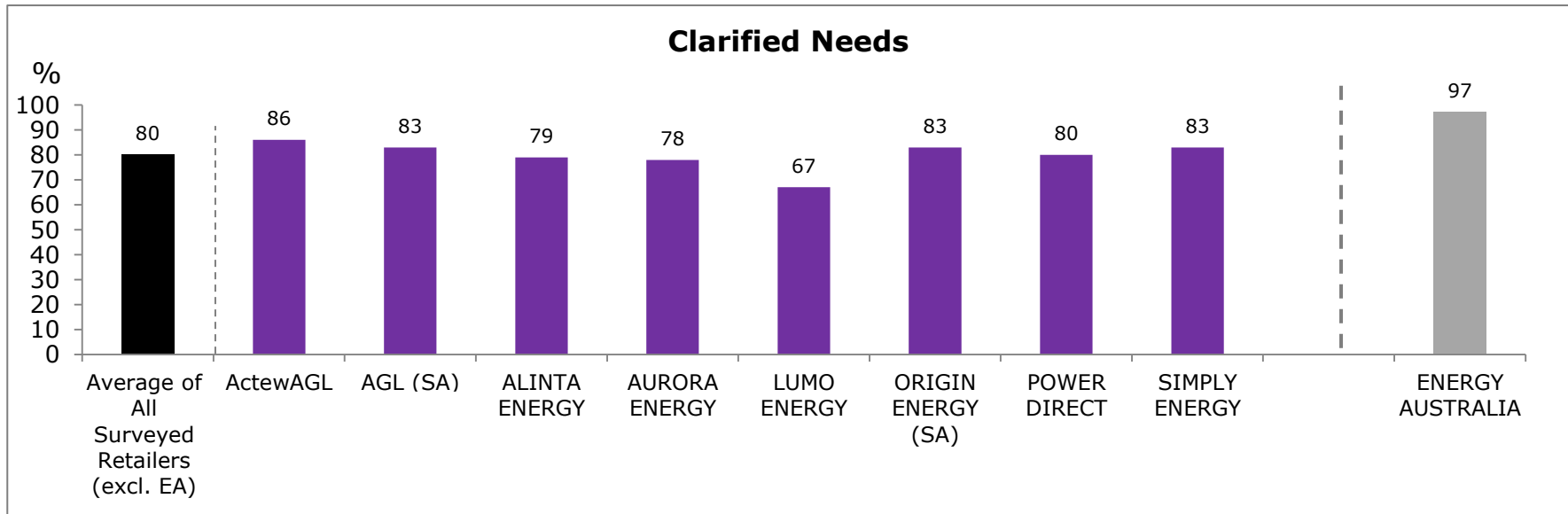
While the average Enquiry Resolution Skills score was 86%, the results for individual retailers were varied.

Due to the mystery shopping approach, the degree to which an Agent can fully resolve a caller's query is limited. When the caller cannot provide actual account details, the Agents are limited in the extent to which they can fully understand the caller's context and explore relevant options for them.

- ActewAGL and Powerdirect achieved the highest scores (91%).
- The lowest score of 73% was for Lumo Energy, followed by Simply Energy (83%).
- The range between the highest and lowest scores is 18 points.
- *EnergyAustralia achieved a high score of 94%.*

Hardship Calls

Service Delivery: Enquiry Resolution (Clarified Needs)

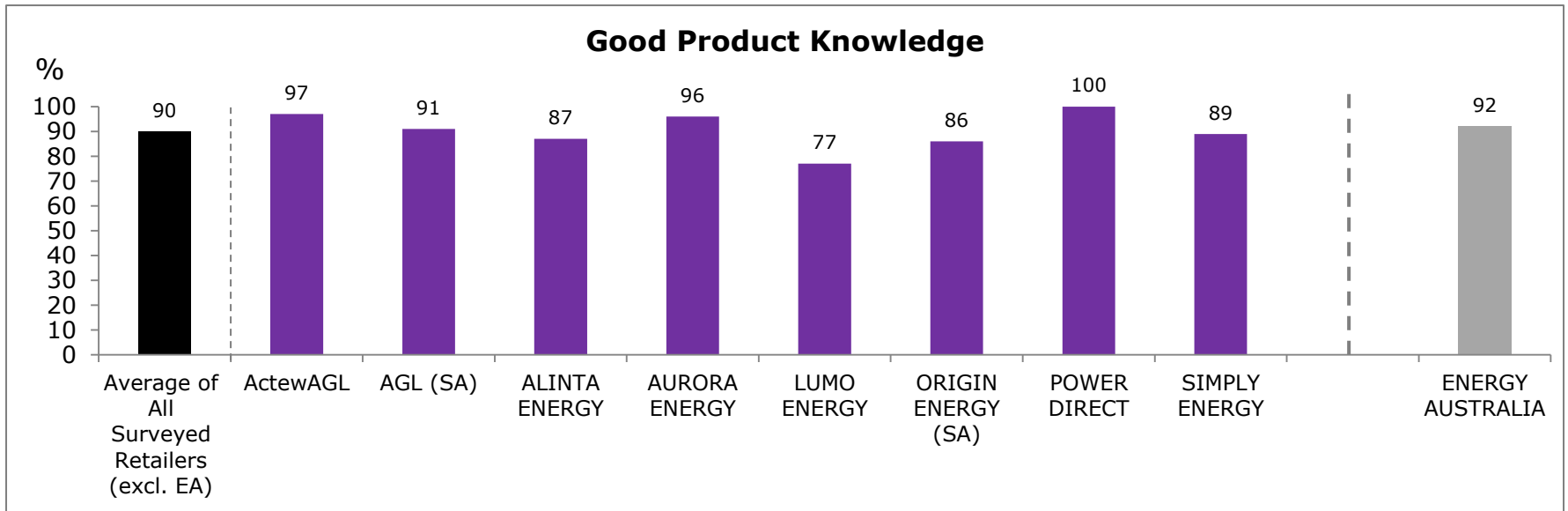


Agents did not seem to consistently strive to understand the callers' queries. The average score for Clarified Needs was 80% – the lowest average score for any Enquiry Resolution Skills measure.

- Again, ActewAGL achieved the highest score (86%), followed by AGL (SA), Origin, and Simply Energy (equal 83%).
- Lumo Energy scored lowest, coming in at 67% – 13 points lower than the Retailers Average.
- *EnergyAustralia received a score of 97% for Clarified Needs.*

Hardship Calls

Service Delivery: Enquiry Resolution (Product Knowledge)

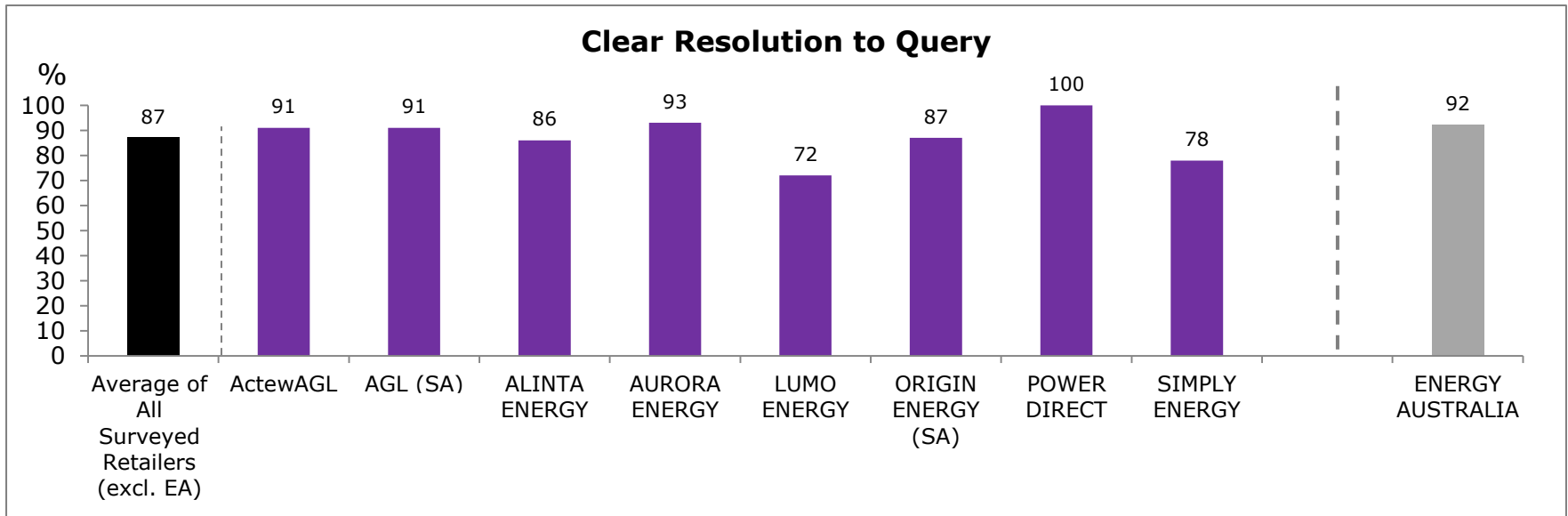


Agents demonstrated that they knew their products and services well, scoring 90% on average for Good Product Knowledge – the highest average score for any measure of Enquiry Resolution Skills.

- Powerdirect achieved a perfect score, followed by ActewAGL (97%) and Aurora Energy (96%).
- Lumo Energy received the lowest score of 77%, nine points below the next lowest score of 86%.
- The range among retailers is 20 points.
- *EnergyAustralia scored 92% for this measure.*

Hardship Calls

Service Delivery: Enquiry Resolution (Clear Resolution)

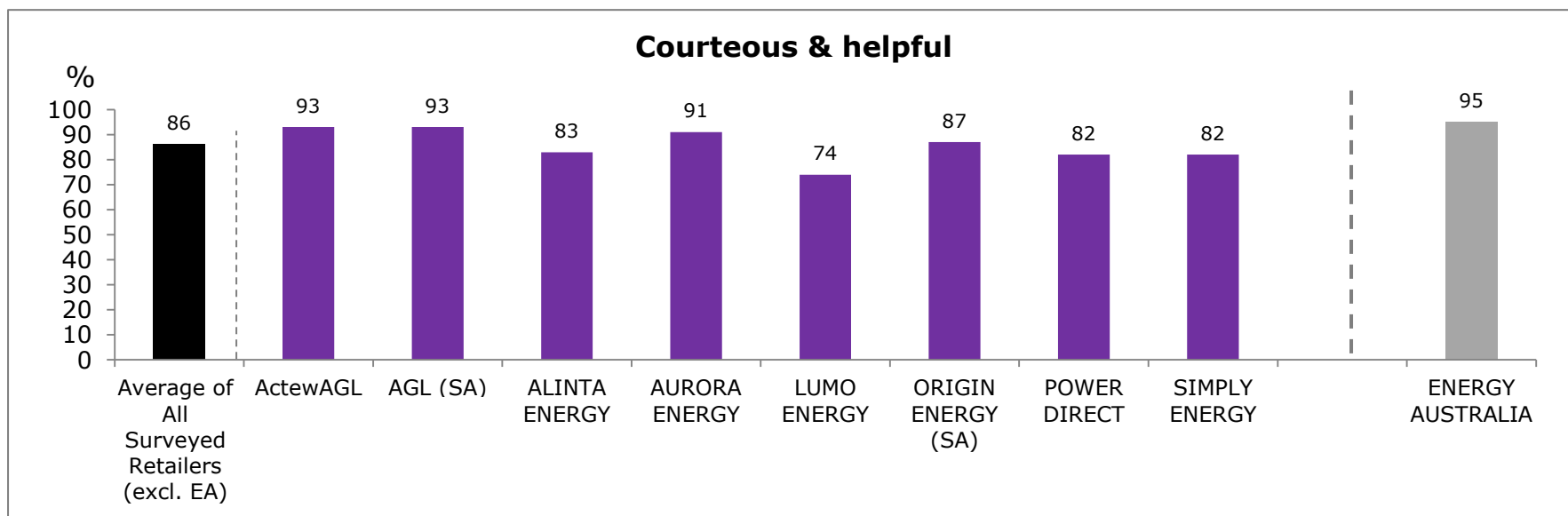


In 87% of calls, Agents were able to provide a Clear Resolution to Query.

Powerdirect achieved a perfect score, exceeding the retailer average by 13 points. Other retailers with a high score were Aurora Energy (93%), ActewAGL and AGL (SA) (both at 91%).

- Lumo Energy again achieved the lowest score at 72% (15 points below the Retailers Average). The second lowest was Simply Energy, with the score of 78%.
- *EnergyAustralia scored 92% for Clear Resolution to Query.*

Service Delivery: Enquiry Resolution (Courteous & Helpful)



The Energy Sector Agents were found to be courteous & helpful during the calls, with an average score of 86%.

- The three best performing retailers were ActewAGL, AGL (SA) (equal 93%) and Aurora Energy (91%). No retailers achieved a perfect score.
- Lumo Energy scored lowest at 74% – 14 points behind the Retailers Average.
- *EnergyAustralia recorded a score of 95%.*

Communications Skills

This section presents retailers' scores for the Communications Skills measures. These consist of:

Average Communication Skills

Matched Speech

Correct Grammar

Patient & Tolerant

Avoided Interrupting

Developed Rapport

Maintained Contact

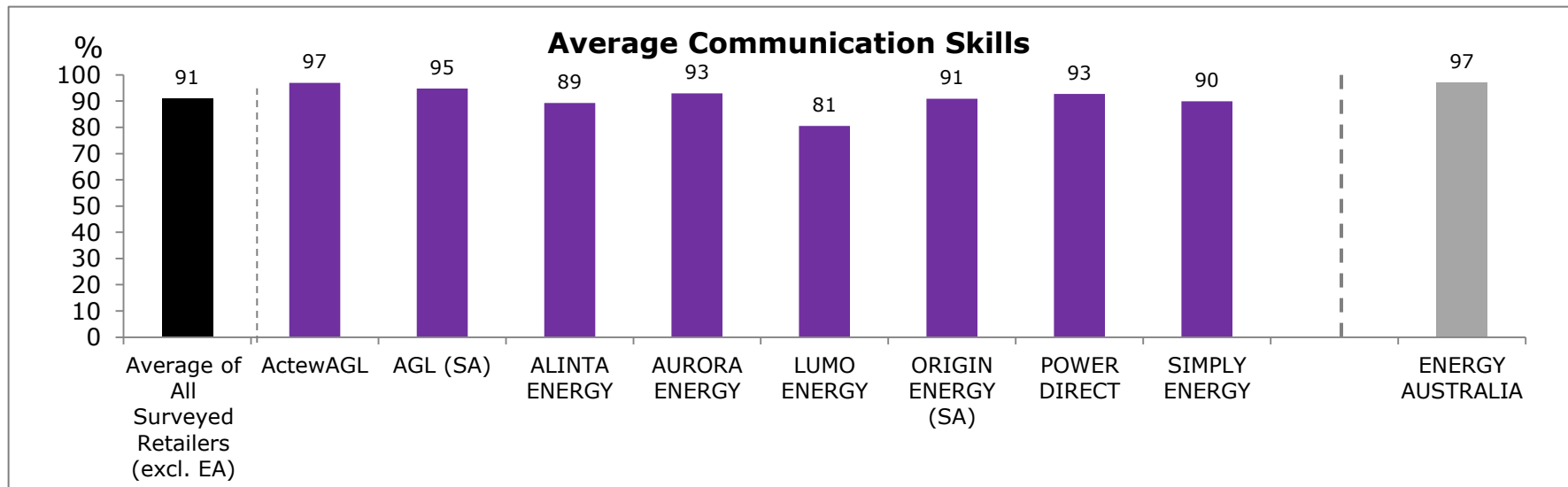
Projected Confidence

Avoided Slang/Jargon

Note:

Communication Skills are considered to be important but not essential to the success of a call. Therefore, Communication Skills are assessed, but are not included in the calculation of the Overall Performance Index.

Hardship Calls Communication Skills



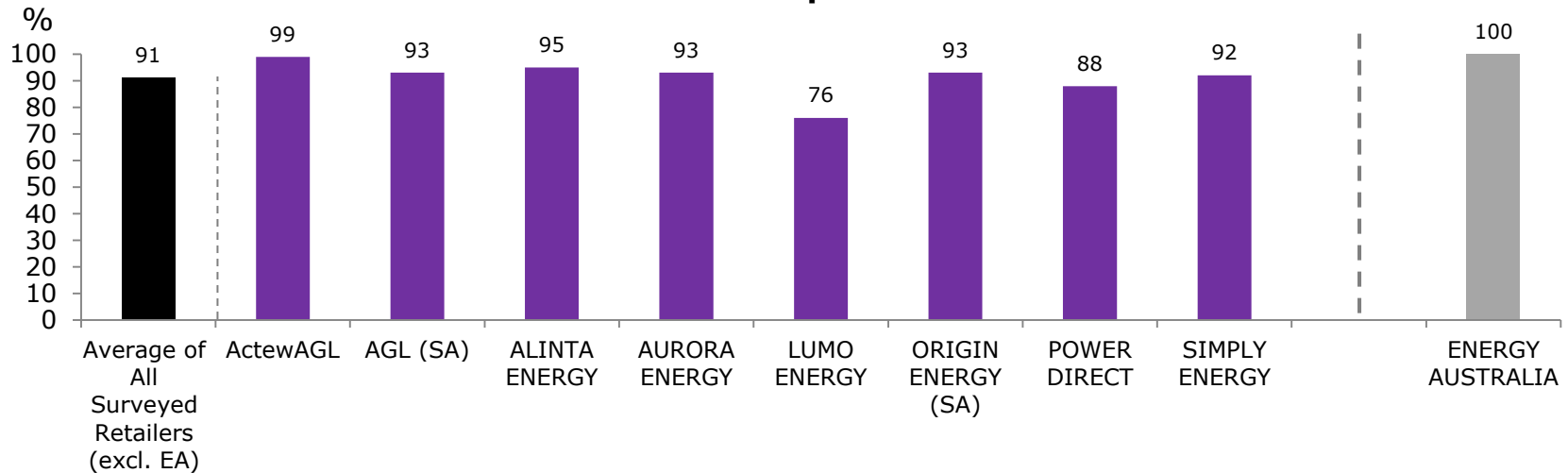
The Energy Sector Agents received, on average, a score of 91% for Communication Skills.

- The highest scores were recorded for ActewAGL (97%) and AGL (SA) (95%)
- Aurora Energy and Origin Energy were equal third at 93%.
- Lumo Energy received the lowest score (81%), which was 10 points below the average.
- The range between highest and lowest performer was 16 points.
- The individual measures of Communication Skills are detailed on the following pages.
- *EnergyAustralia achieved a Communication Skills score of 97%.*

Hardship Calls

Communication Skills (Matched Speech)

Matched Speech

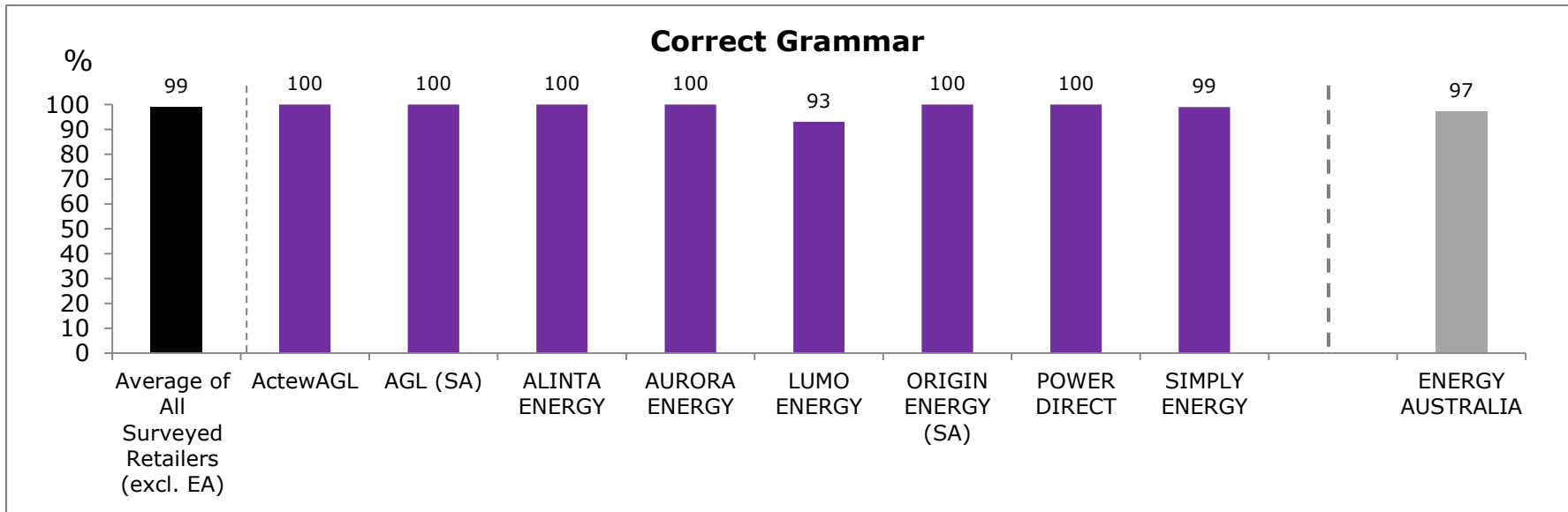


The Energy Sector Agents received, on average, a score of 91% for matching the caller's volume and pace of speech.

- The highest scores were recorded for ActewAGL (99%) and Alinta Energy (95%). AGL (SA), Aurora Energy and Origin Energy were all equal third at 93%.
- Again, Lumo Energy received the lowest score, which was 12 points below the next lowest (Powerdirect).
- The range between highest and lowest scores was 23 points.
- *EnergyAustralia had a perfect score.*

Hardship Calls

Communication Skills (Correct Grammar)

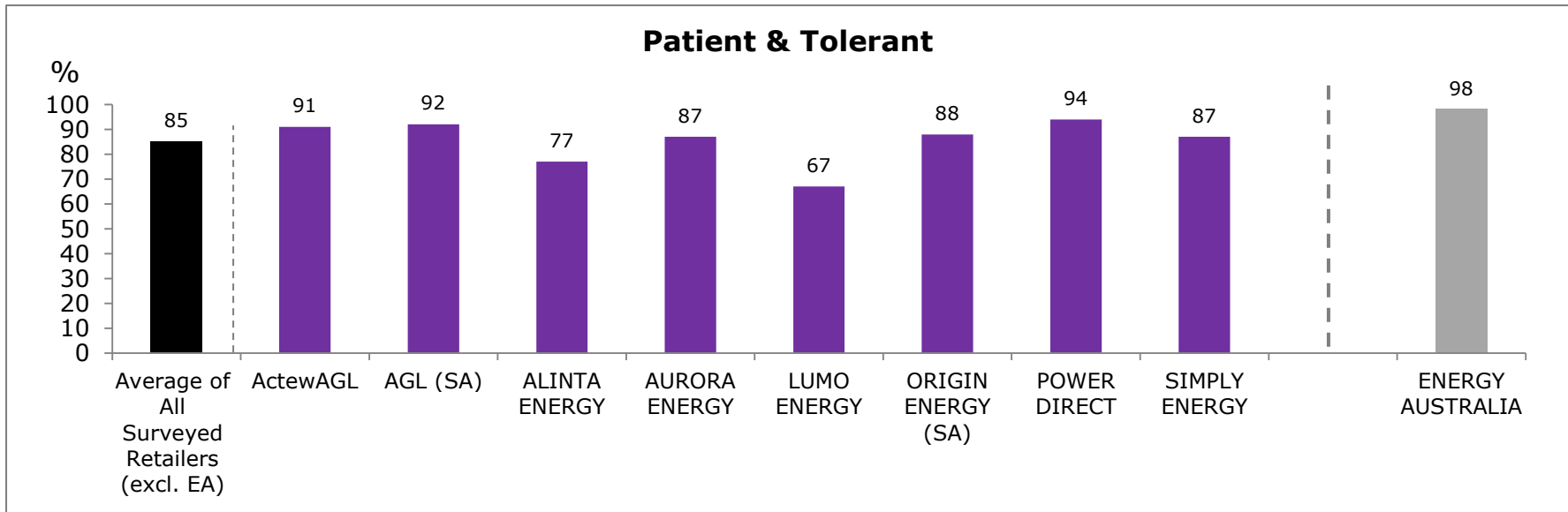


The Energy Sector Agents had an excellent understanding of the English language, achieving a near perfect score of 99% for Correct Grammar.

- The majority of retailers achieved a perfect score: ActewAGL, AGL (SA), Alinta Energy, Aurora Energy, Origin Energy and Powerdirect.
- Lumo Energy scored lowest at 93%, although this was still a good score.
- *EnergyAustralia's score for Correct Grammar was 97%.*

Hardship Calls

Communication Skills (Patient & Tolerant)

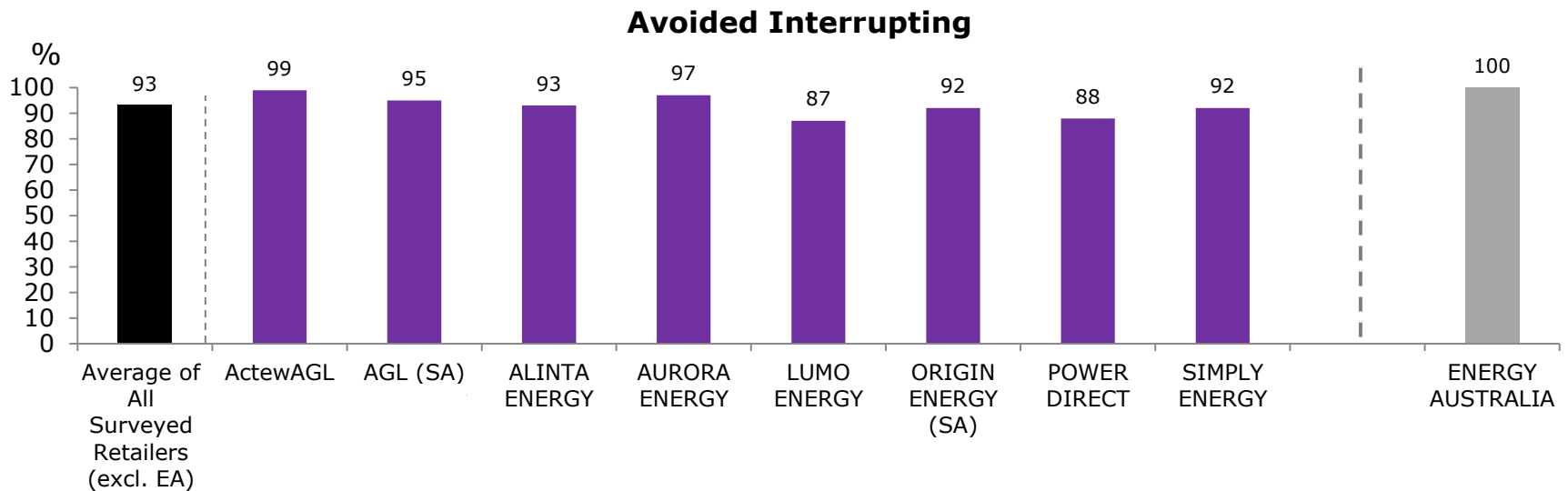


There was relatively more variation in scores in the extent to which Energy Sector Agents took time to ensure they were Patient and Tolerant during callers' enquiries, with scores ranging from 67% to 94%

- The three best performing retailers were the only ones with a score higher than 90%. These were Powerdirect (94%), AGL (SA) (92%) and ActewAGL (91%).
- Lumo Energy, followed by Alinta Energy, scored lowest at 67% and 77% respectively.
- The range between highest and lowest scores was 27 points.
- *EnergyAustralia's score for Patient and Tolerant was high at 98%.*

Hardship Calls

Communication Skills (Avoided Interrupting)

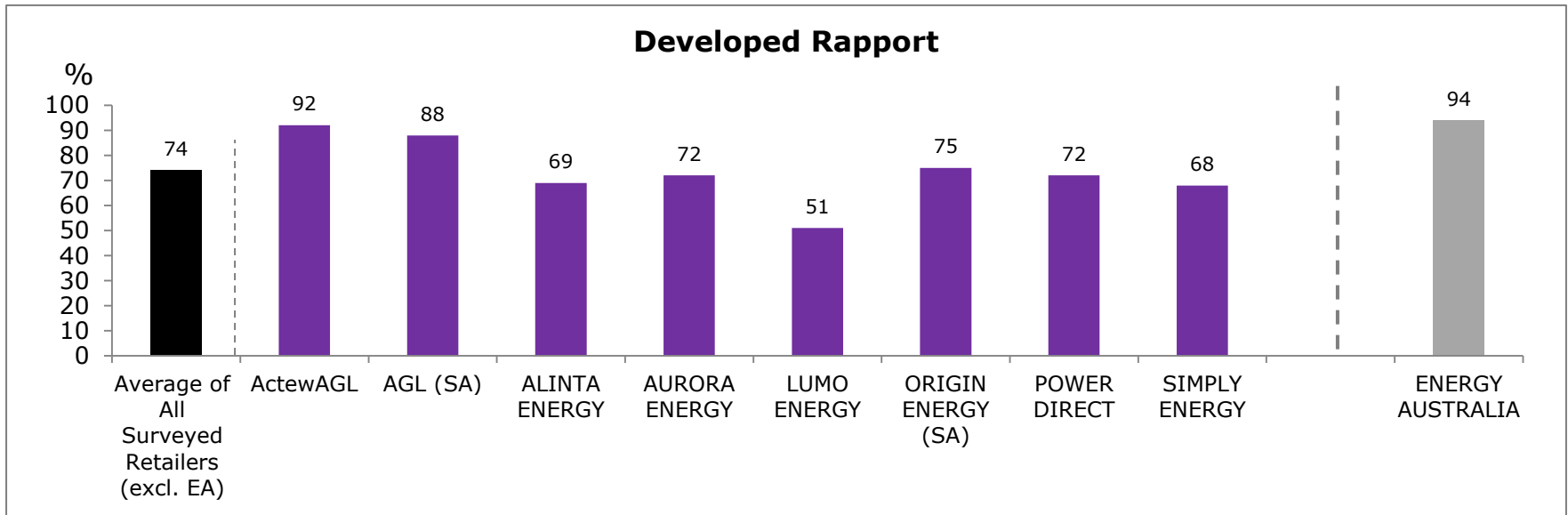


Overall, the Energy Sector Agents tended not to interrupt while the callers were speaking, resulting in an average score of 93% for Avoided Interrupting.

- ActewAGL again performed best at 99%, followed closely by Aurora Energy (97%) and AGL (SA) (95%).
- The lowest scores were for Lumo Energy (87%) and Powerdirect (88%), but these were still relatively good scores.
- The range between the highest and lowest performers was 12 points.
- *EnergyAustralia received a perfect score for this measure.*

Hardship Calls

Communication Skills (Developed Rapport)



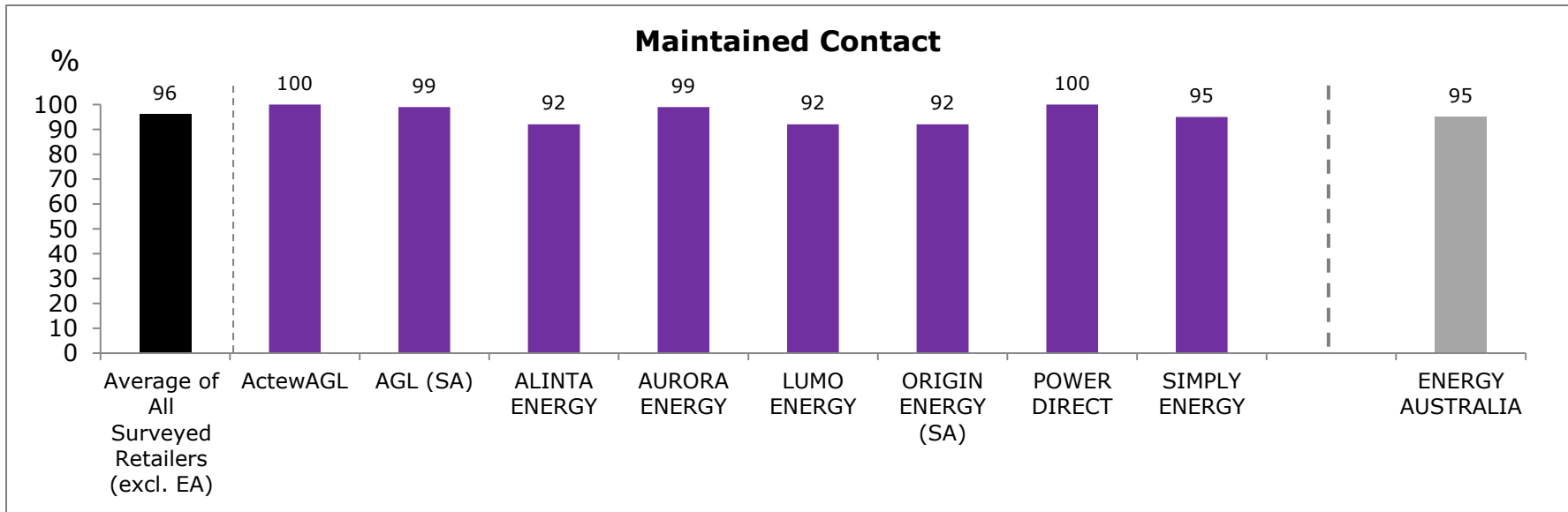
Agents Developed a Rapport with the caller in only 74% of calls, making this the lowest scoring measure across the survey.

Developing a Rapport is about how effectively an Agent shows empathy and understanding towards a caller's situation. Particularly when a caller is ringing about a situation of financial hardship, being sensitive to their situation is essential to delivering a good service.

- ActewAGL (92%) and AGL (SA) (88%) both performed well compared to other retailers.
- Scores for other retailers did not reach the 80% mark, with Lumo the lowest at 51% – 17 points behind the second lowest, Simply Energy.
- *EnergyAustralia* received a high score of 94%.

Hardship Calls

Communication Skills (Maintained Contact)

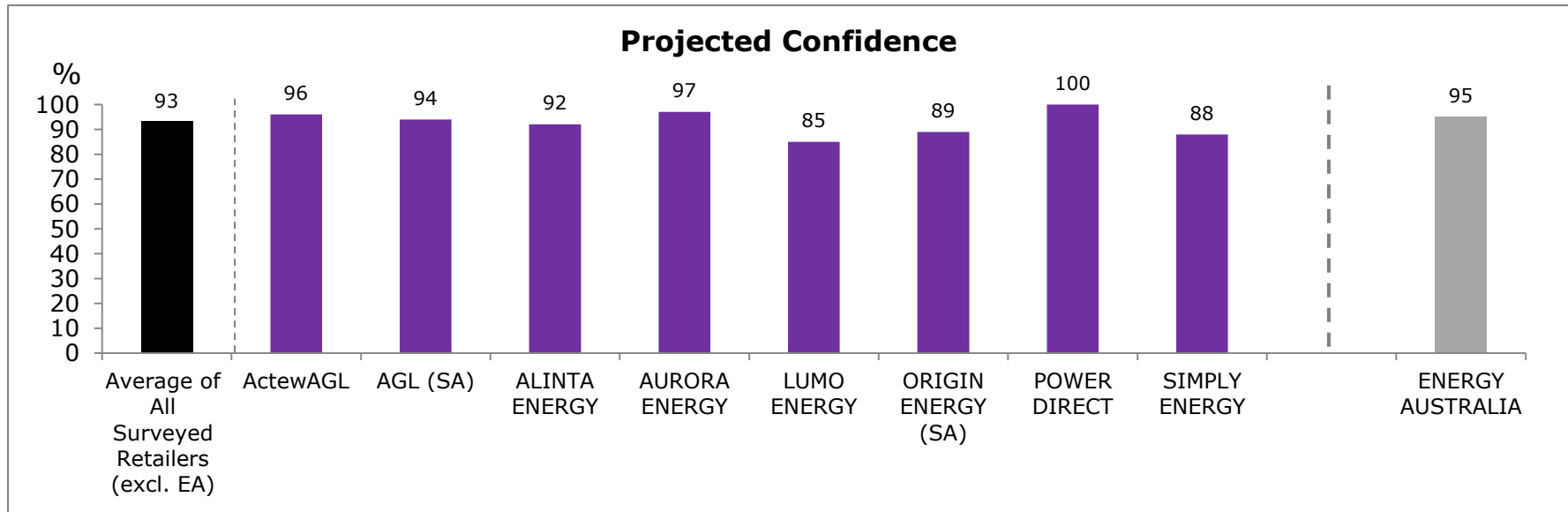


The Energy Sector Agents were consistently good at avoiding uncomfortable silences during a call, achieving a score of 96% for Maintained Contact.

- ActewAGL and Powerdirect obtained a perfect score for the measure. AGL (SA) and Aurora Energy also performed well with a score of 99%.
- All other retailers achieved a score higher than 90%, with little variation in retailers' performance across this measure.
- *EnergyAustralia's score for Maintained Contact was 95%.*

Hardship Calls

Communication Skills (Projected Confidence)

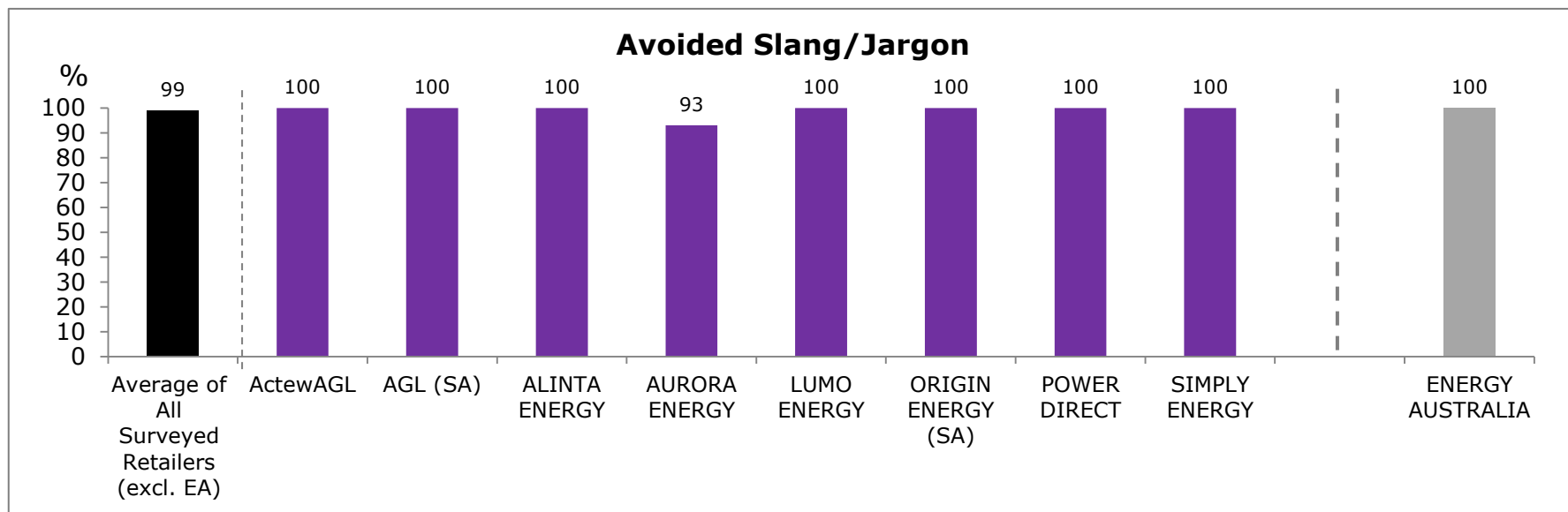


The Energy Sector Agents came across as very certain that the solutions they offered the callers were correct and useful, scoring 93% on average for Projected Confidence.

- A perfect score was achieved by Powerdirect, followed by 97% for Aurora Energy and 96% for ActewAGL.
- Lumo Energy and Simply Energy were in the bottom two positions at 85% and 88% respectively.
- There was a difference of 15 points between the highest and lowest performer.
- *The score for EnergyAustralia for Projected Confidence was 95%.*

Hardship Calls

Communications Skills (Avoided Slang/Jargon)



Similar to Correct Grammar, the Energy Sector Agents were extremely good at avoiding terms or expressions that may be unfamiliar or too technical for the callers. A near perfect score of 99% on average for Avoided Slang or Jargon was one of the better performing Communication Skills measures.

- The only retailer that did not receive a perfect score was Aurora Energy (93%).
- The range between Aurora Energy's score and the rest of the retailers was only seven points – the narrowest margin for any Communication Skills measure. This demonstrates overall excellent performance across all retailers for this measure.
- *EnergyAustralia also received a perfect score for this measure.*

Part 3 – Hardship Calls

Results by Retailer

This section presents results for each retailer against all the measures.

- ActewAGL
- AGL (SA)
- Alinta Energy
- Aurora Energy
- Lumo Energy (SA)
- Origin Energy
- Powerdirect
- Simply Energy
- EnergyAustralia

Note:

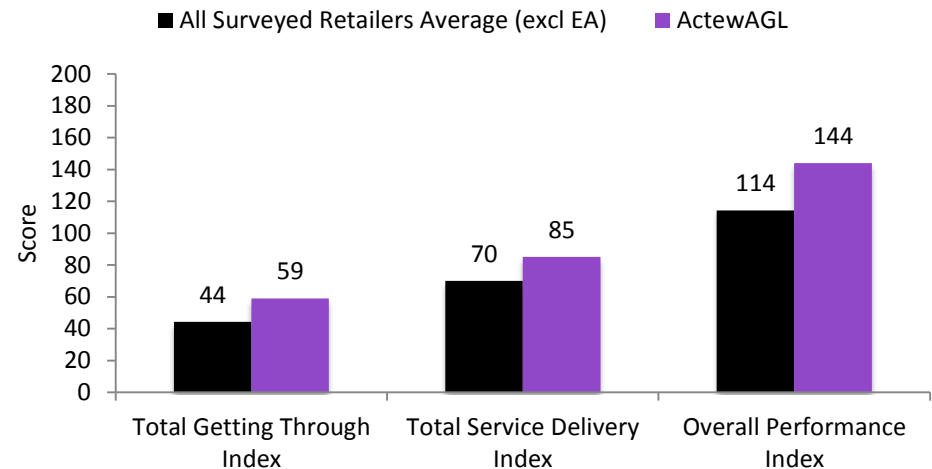
The index scores are based on weighted calculations and will therefore not appear to have a direct relationship with scores for the individual measures.

Hardship Calls

Results by Retailer: ActewAGL

Customer Service Index		All Surveyed Retailers Average (excl EA)	ActewAGL
Successful calls %		89	97
Unsuccessful calls %		11	3
Getting Through Index (100)	Connect Time (60)		
	Connect Time (in seconds)	98	61
	Greeting Skills (40)		
	Salutation	98	93
	Company Name	91	100
	Agent Name	99	99
	Offer to Help	90	97
	Sign Off	99	100
	Average Greeting Skills	95	98
	TOTAL GETTING THROUGH INDEX	44	59
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	86
	Businesslike & Unemotive	27	16
	Total Acceptable	99	99
	Disinterested /Curt	1	0
	Laidback /Easygoing	1	2
	Total Unacceptable	2	2
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	80
	Good Product Knowledge	90	97
	Clear Resolution to Query	87	91
	Courteous & Helpful	86	93
	Average Enquiry Resolution Skills	86	91
	TOTAL SERVICE DELIVERY INDEX	70	85
OVERALL PERFORMANCE SCORE (200)		114	144

ActewAGL Customer Service Score (Hardship Calls)



ActewAGL Agents delivered an above average performance across both customer service indices.

- ActewAGL had a call success rate of 97%, second only to AGL (SA) (98%), which has contributed to its high scores.
- ActewAGL's Getting Through and Service Delivery scores were both 15 points above average. The Overall Performance score was therefore 30 points above average.
- Scores above average were for Offer to Help; Interested, Warm and Helpful Manner; Good Product Knowledge; Clear Resolution to Query; and Courteous and Helpful.
- Salutation was the only measure where ActewAGL trailed behind the Retailers Average (by five points).
- ActewAGL was able to connect a caller through to their Agent approximately half a minute faster than the Retailers Average.

Hardship Calls

Results by Retailer: ActewAGL

Service Delivery Non-Index	Customer Service Non-Index	All Surveyed Retailers Average (excl EA)	ActewAGL
	Communication Skills		
	Matched Speech	91	99
	Correct Grammar	99	100
	Patient & Tolerant	85	91
	Avoided Interrupting	93	99
	Developed Rapport	74	92
	Maintained Contact	96	100
	Projected Confidence	93	96
	Avoided Slang/Jargon	99	100
	Average Communication Skills	91	97

ActewAGL's performance was generally above the Retailers Average for Communication Skills.

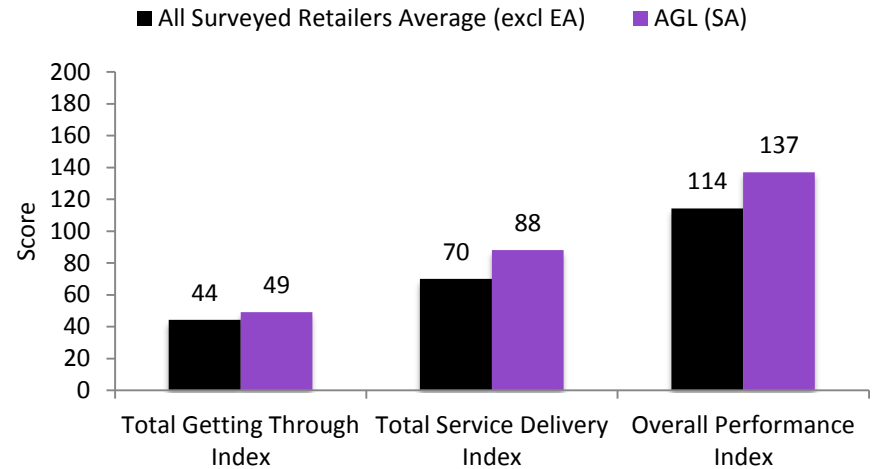
- ActewAGL Agents received a perfect score for Correct Grammar, Maintained Contact, and Avoided Slang or Jargon.
- ActewAGL performed above or on par with Retailers Average in every measure of Communication Skills, with the most noticeable difference being Developed Rapport (18 points better) and Matched Speech (eight points better).

Hardship Calls

Results by Retailer: AGL (SA)

Customer Service Index		All Surveyed Retailers Average (excl EA)	AGL (SA)
Getting Through Index (100)	Successful calls %	89	98
	Unsuccessful calls %	11	2
	Connect Time (60)		
	Connect Time (in seconds)	98	79
	Greeting Skills (40)		
	Salutation	98	96
	Company Name	91	100
	Agent Name	99	100
	Offer to Help	90	98
	Sign Off	99	100
	Average Greeting Skills	95	99
TOTAL GETTING THROUGH INDEX		44	49
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	89
	Businesslike & Unemotive	27	11
	Total Acceptable	99	100
	Disinterested /Curt	1	1
	Laidback /Easygoing	1	0
	Total Unacceptable	2	1
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	83
	Good Product Knowledge	90	91
	Clear Resolution to Query	87	91
	Courteous & Helpful	86	93
	Average Enquiry Resolution Skills	86	89
	TOTAL SERVICE DELIVERY INDEX	70	88
OVERALL PERFORMANCE SCORE (200)		114	137

AGL (SA) Customer Service Score (Hardship Calls)



AGL (SA) is another high-performing retailer in this survey, with scores above average on both customer service indices.

- AGL (SA)'s scores for Getting Through, Service Delivery and Overall Performance were five, 18 and 23 points above the Retailers Average respectively.
- Similar to ActewAGL, most measures received a better or comparable score to Retailers Average, with the most noteworthy difference for Interested, Warm and Helpful Manner (17 points higher).
- The Connect Time at AGL (SA) was 19 seconds faster than the Retailers Average. AGL (SA) had a high rate of successful calls (98%).

Hardship Calls

Results by Retailer: AGL (SA)

Service Delivery Non-Index	Customer Service Non-Index	All Surveyed Retailers Average (excl EA)	AGL (SA)
	Communication Skills		
	Matched Speech	91	93
	Correct Grammar	99	100
	Patient & Tolerant	85	92
	Avoided Interrupting	93	95
	Developed Rapport	74	88
	Maintained Contact	96	99
	Projected Confidence	93	94
	Avoided Slang/Jargon	99	100
	Average Communication Skills	91	95

AGL (SA) also performed above or on par with the Retailers Average for Communication Skills.

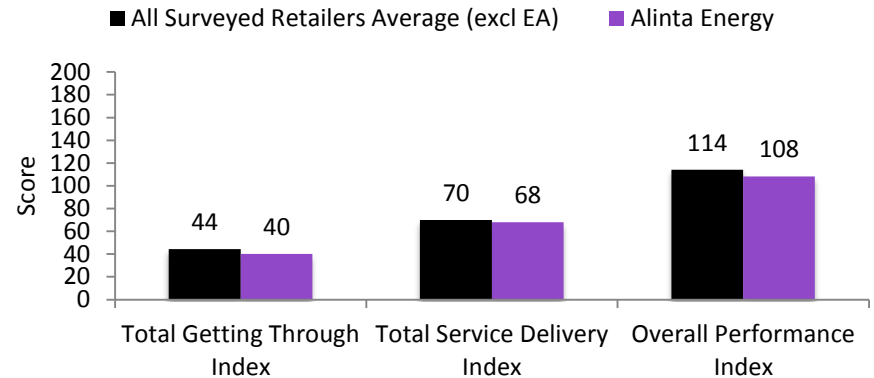
- AGL (SA) Agents were awarded with a perfect score for Correct Grammar and Avoided Slang or Jargon.
- Similar to ActewAGL, AGL (SA) led the Retailers Average by a noticeable margin on Developed Rapport (14 points lead).
- Another difference of note was Patient and Tolerant, where AGL (SA) recorded a score seven points higher than Retailers Average.

Hardship Calls

Results by Retailer: Alinta Energy

Customer Service Index		All Surveyed Retailers Average (excl EA)	ALINTA ENERGY
Getting Through Index (100)	Successful calls %	89	93
	Unsuccessful calls %	11	7
	Connect Time (60)		
	Connect Time (in seconds)	98	119
	Greeting Skills (40)		
	Salutation	98	100
	Company Name	91	100
	Agent Name	99	94
	Offer to Help	90	77
	Sign Off	99	100
	Average Greeting Skills	95	94
	TOTAL GETTING THROUGH INDEX	44	40
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	67
	Businesslike & Unemotive	27	32
	Total Acceptable	99	99
	Disinterested /Curt	1	0
	Laidback /Easygoing	1	2
	Total Unacceptable	2	2
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	79
	Good Product Knowledge	90	87
	Clear Resolution to Query	87	86
	Courteous & Helpful	86	83
	Average Enquiry Resolution Skills	86	84
	TOTAL SERVICE DELIVERY INDEX	70	68
OVERALL PERFORMANCE SCORE (200)		114	108

Alinta Energy Customer Service Score (Hardship Calls)



Alinta Energy's Overall Performance was slightly lower than the Retailers Average.

- The Getting Through, Service Delivery and Overall Performance indices were four, two and six points behind Retailers Average respectively.
- Greeting Skills measures that scored lower than the Retailers Average were Agent Name (by five points) and Offer to Help (by 13 points).
- Alinta Energy was five points below Retailers Average for Interested, Warm and Helpful Manner.
- Most Enquiry Resolution Skills criteria received scores comparable to Retailers Average, with the exception of Good Product Knowledge, and Courteous and Helpful (three points below).
- The Connect Time was 21 seconds slower than the Retailers Average.

Hardship Calls

Results by Retailer: Alinta Energy

Customer Service Non-Index		All Surveyed Retailers Average (excl EA)	ALINTA ENERGY
Service Delivery Non-Index	Communication Skills		
	Matched Speech	91	95
	Correct Grammar	99	100
	Patient & Tolerant	85	77
	Avoided Interrupting	93	93
	Developed Rapport	74	69
	Maintained Contact	96	92
	Projected Confidence	93	92
	Avoided Slang/Jargon	99	100
	Average Communication Skills	91	90

Alinta Energy's overall performance on Communication Skills was in line with the Retailer Average with some measures scoring above and others below Average.

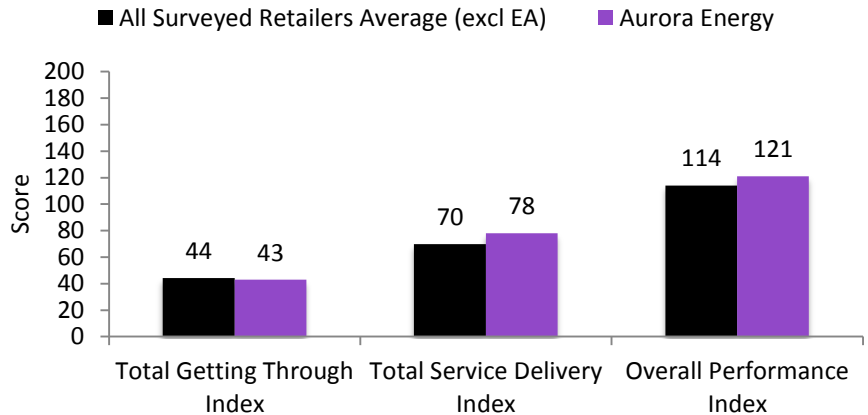
- Alinta Energy Agents received a perfect score for Correct Grammar and Avoided Slang or Jargon, and a score above 90% for Matched Speech, Avoided Interrupting, Maintained Contact and Projected Confidence.
- Matched Speech was the only measure with a score higher than Retailers Average (by four points).
- Developed Rapport achieved the lowest score, followed by Patient and Tolerant.

Hardship Calls

Results by Retailer: Aurora Energy

Customer Service Index		All Surveyed Retailers Average (excl EA)	AURORA ENERGY
Getting Through Index (100)	Successful calls %	89	94
	Unsuccessful calls %	11	6
	Connect Time (60)		
	Connect Time (in seconds)	98	107
	Greeting Skills (40)		
	Salutation	98	100
	Company Name	91	100
	Agent Name	99	100
	Offer to Help	90	95
	Sign Off	99	100
	Average Greeting Skills	95	99
	TOTAL GETTING THROUGH INDEX	44	43
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	74
	Businesslike & Unemotive	27	25
	Total Acceptable	99	99
	Disinterested /Curt	1	0
	Laidback /Easygoing	1	2
	Total Unacceptable	2	2
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	78
	Good Product Knowledge	90	96
	Clear Resolution to Query	87	93
	Courteous & Helpful	86	91
	Average Enquiry Resolution Skills	86	90
	TOTAL SERVICE DELIVERY INDEX	70	78
OVERALL PERFORMANCE SCORE (200)		114	121

Aurora Energy Customer Service Score (Hardship Calls)



Aurora Energy performed slightly better than the Retailers Average.

- The breakout scores Aurora Energy received were generally higher than Retailers Average, although not by a big margin.
- The biggest difference in scores was for Company Name (nine points higher than Retailers Average), followed by Good Product Knowledge and Clear Resolution to Query (both six points ahead).
- A pleasing result is that nearly all of the Greeting Skills measures were perfect (except Offer to Help at 95%).
- Interested, Warm and Helpful and Clarified Needs received the lowest scores overall (74% and 78% respectively).
- Aurora's Connect Time was nine seconds below the Retailers Average.

Hardship Calls

Results by Retailer: Aurora Energy

Service Delivery Non-Index	Customer Service Non-Index	All Surveyed Retailers Average (excl EA)	AURORA ENERGY
	Communication Skills		
	Matched Speech	91	93
	Correct Grammar	99	100
	Patient & Tolerant	85	87
	Avoided Interrupting	93	97
	Developed Rapport	74	72
	Maintained Contact	96	99
	Projected Confidence	93	97
	Avoided Slang/Jargon	99	93
	Average Communication Skills	91	93

Aurora Energy achieved scores that were marginally better than Retailer Average across most of the Communication Skills criteria.

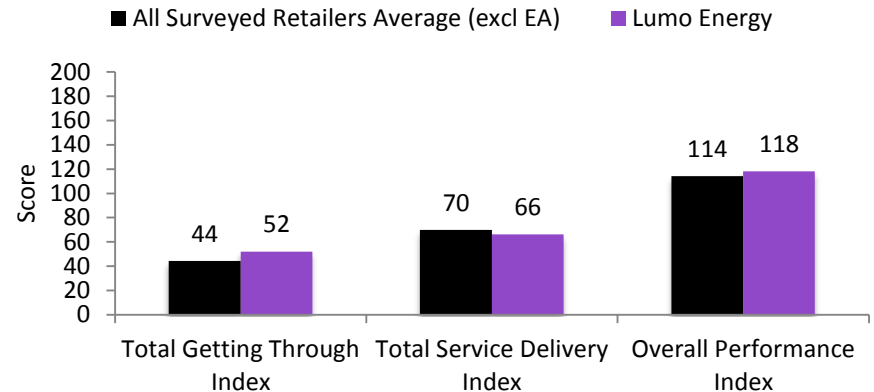
- While most of the differences in scores were negligible, Avoided Interrupting and Projected Confidence were worth noting at four points better than Retailers Average, and Avoided Slang or Jargon at six points worse.
- Developed Rapport was the worst scoring measure for Aurora Energy at 72% – on par with Retailers Average at 74%.

Hardship Calls

Results by Retailer: Lumo Energy

Customer Service Index		All Surveyed Retailers Average (excl EA)	LUMO ENERGY
Getting Through Index (100)	Successful calls %	89	100
	Unsuccessful calls %	11	-
	Connect Time (60)		
	Connect Time (in seconds)	98	74
	Greeting Skills (40)		
	Salutation	98	100
	Company Name	91	100
	Agent Name	99	100
	Offer to Help	90	100
	Sign Off	99	97
	Average Greeting Skills	95	99
TOTAL GETTING THROUGH INDEX		44	52
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	57
	Businesslike & Unemotive	27	40
	Total Acceptable	99	97
	Disinterested /Curt	1	0
	Laidback /Easygoing	1	3
	Total Unacceptable	2	3
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	67
	Good Product Knowledge	90	77
	Clear Resolution to Query	87	72
	Courteous & Helpful	86	74
	Average Enquiry Resolution Skills	86	73
TOTAL SERVICE DELIVERY INDEX		70	66
OVERALL PERFORMANCE SCORE (200)		114	118

Lumo Energy Customer Service Score (Hardship Calls)



Lumo Energy's Overall Performance was higher than Retailers Average, largely due to the shorter Connect Time, better Greeting Skills, and no calls exceeding Maximum Wait Time.

- Lumo Energy achieved a perfect score for all Greeting Skills measures except for Sign Off.
- While the proportion of Total Acceptable Manner was high, Best Practice Manner that is Interested, Warm and Helpful was much lower than Retailers Average (by 15 points).
- Enquiry Resolution Skills is the area to focus improvement on, as all the measures were at least 10 points below Retailers Average.
- Connect Time was 24 seconds faster than Retailers Average.

Hardship Calls

Results by Retailer: Lumo Energy

Customer Service Non-Index		All Surveyed Retailers Average (excl EA)	LUMO ENERGY
Service Delivery Non-Index	Communication Skills		
	Matched Speech	91	76
	Correct Grammar	99	93
	Patient & Tolerant	85	67
	Avoided Interrupting	93	87
	Developed Rapport	74	51
	Maintained Contact	96	92
	Projected Confidence	93	85
	Avoided Slang/Jargon	99	100
	Average Communication Skills	91	81

Across Communication Skills, Lumo Energy mostly performed below average, particularly on Developed Rapport, and Patient and Tolerant.

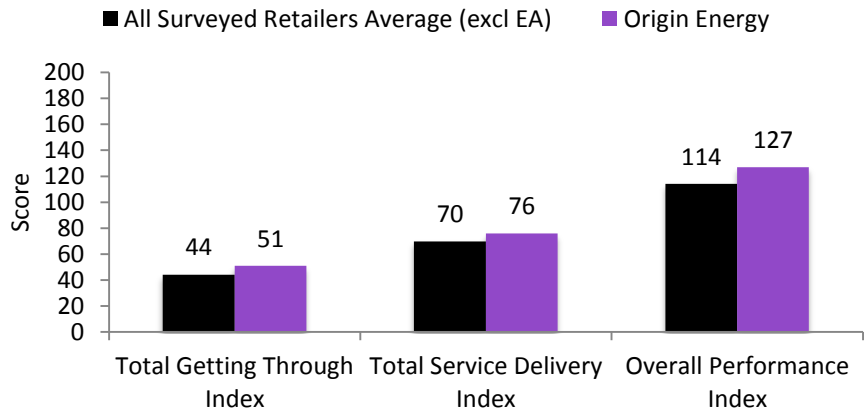
- A perfect score (on par with the Average) was achieved for Avoided Slang or Jargon.
- All other Communication Skills scored noticeably lower than Retailers Average, with the widest gap for Developed Rapport (23 points below), Patient and Tolerant (18 points below), and Matched Speech (15 points below).
- Similar to most retailers, Developed Rapport, and Patient and Tolerant achieved the lowest scores – however, Lumo Energy's 51% for Developed Rapport was the lowest for any retailer.
- The Communication Skills results, together with the results from Service Delivery Index discussed previously, suggest that priority should be given to improvements in both areas.

Hardship Calls

Results by Retailer: Origin Energy

Customer Service Index		All Surveyed Retailers Average (excl EA)	ORIGIN ENERGY
Successful calls %		89	95
Unsuccessful calls %		11	5
Getting Through Index (100)	Connect Time (60)		
	Connect Time (in seconds)	98	71
	Greeting Skills (40)		
	Salutation	98	93
	Company Name	91	69
	Agent Name	99	100
	Offer to Help	90	90
	Sign Off	99	99
	Average Greeting Skills	95	90
	TOTAL GETTING THROUGH INDEX	44	51
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	72
	Businesslike & Unemotive	27	26
	Total Acceptable	99	98
	Disinterested /Curt	1	2
	Laidback /Easygoing	1	0
	Total Unacceptable	2	2
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	83
	Good Product Knowledge	90	86
	Clear Resolution to Query	87	87
	Courteous & Helpful	86	87
	Average Enquiry Resolution Skills	86	86
	TOTAL SERVICE DELIVERY INDEX	70	76
OVERALL PERFORMANCE SCORE (200)		114	127

Origin Energy Customer Service Score (Hardship Calls)



Origin Energy's scores for most measures were similar to the Retailers Average.

- Origin Energy's scores for Getting Through, Service Delivery and Overall Performance were seven, six and 13 points higher than the Retailers Average respectively.
- Two Greeting Skills measures – Salutation and Company Name – scored lower than the Retailers Average. Company Name in particular was 22 points lower.
- Agent Manner and Enquiry Resolution Skills scores were relatively similar to Retailers Average, except for Clarified Needs (three points higher) and Good Product Knowledge (four points lower).
- Connect Time of 71 seconds was almost half a minute faster than Retailers Average.

Hardship Calls

Results by Retailer: Origin Energy

Service Delivery Non-Index	Customer Service Non-Index	All Surveyed Retailers Average (excl EA)	ORIGIN ENERGY
	Communication Skills		
	Matched Speech	91	93
	Correct Grammar	99	100
	Patient & Tolerant	85	88
	Avoided Interrupting	93	92
	Developed Rapport	74	75
	Maintained Contact	96	92
	Projected Confidence	93	89
	Avoided Slang/Jargon	99	100
	Average Communication Skills	91	91

With a few exceptions, the Communication Skills scores were relatively comparative with the Retailers Average.

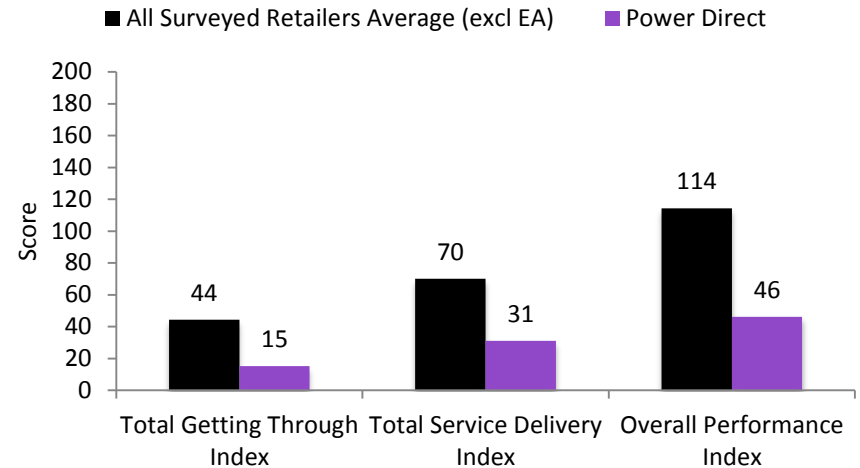
- Origin Energy's Agents achieved a perfect score for Correct Grammar and Avoided Slang or Jargon.
- Maintained Contact and Projected Confidence at 92% and 89% respectively were both four points lower than Retailers Average.
- Developed Rapport was the lowest scoring measure at 75%.

Hardship Calls

Results by Retailer: Powerdirect

Customer Service Index		All Surveyed Retailers Average (excl EA)	POWER DIRECT
Getting Through Index (100)	Successful calls %	89	37
	Unsuccessful calls %	11	63
	Connect Time (60)		
	Connect Time (in seconds)	98	196
	Greeting Skills (40)		
	Salutation	98	100
	Company Name	91	92
	Agent Name	99	100
	Offer to Help	90	69
	Sign Off	99	100
	Average Greeting Skills	95	92
	TOTAL GETTING THROUGH INDEX	44	15
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	69
	Businesslike & Unemotive	27	31
	Total Acceptable	99	100
	Disinterested /Curt	1	0
	Laidback /Easygoing	1	0
	Total Unacceptable	2	0
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	80
	Good Product Knowledge	90	100
	Clear Resolution to Query	87	100
	Courteous & Helpful	86	82
	Average Enquiry Resolution Skills	86	91
	TOTAL SERVICE DELIVERY INDEX	70	31
OVERALL PERFORMANCE SCORE (200)		114	46

Powerdirect Customer Service Score (Hardship Calls)



While Powerdirect achieved higher scores than Retailers Average across most measures, the high proportion of calls exceeding the four-minute Maximum Wait Time reduced the index scores substantially. Improving call wait times will improve overall customer satisfaction significantly.

- Calls exceeding four minutes Maximum Wait Time amounted to 63% for Powerdirect.
- Connect Time for completed calls was 98 seconds longer than the Retailers Average.
- The score that was particularly lower than the Retailers Average was Offer to Help (21 points).
- On a positive note, Good Product Knowledge and Clear Resolution to Query received noticeably better scores than Retailers Average (10% and 13% respectively).

Hardship Calls

Results by Retailer: Powerdirect

Customer Service Non-Index		All Surveyed Retailers Average (excl EA)	POWERDIRECT
Service Delivery Non-Index	Communication Skills		
	Matched Speech	91	88
	Correct Grammar	99	100
	Patient & Tolerant	85	94
	Avoided Interrupting	93	88
	Developed Rapport	74	72
	Maintained Contact	96	100
	Projected Confidence	93	100
	Avoided Slang/Jargon	99	100
	Average Communication Skills	91	93

Powerdirect fared relatively better on Communication Skills, achieving scores higher than or on par with Retailers Average across most measures.

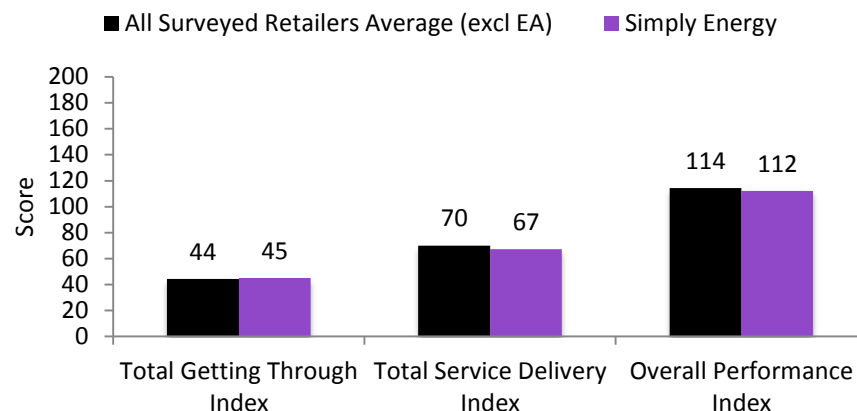
- Patient and Tolerant, Projected Confidence, and Maintained Contact were key strengths at nine, seven and four points above Retailers Average respectively.
- Avoided Interrupting and Matched Speech were below Retailers Average by five and three points respectively.
- Developed Rapport achieved the lowest score (72%), as relevant for most other retailers.

Hardship Calls

Results by Retailer: Simply Energy

	Customer Service Index	All Surveyed Retailers Average (excl EA)	SIMPLY ENERGY
Getting Through Index (100)	Successful calls %	89	90
	Unsuccessful calls %	11	10
	Connect Time (60)		
	Connect Time (in seconds)	98	74
	Greeting Skills (40)		
	Salutation	98	99
	Company Name	91	64
	Agent Name	99	100
	Offer to Help	90	92
	Sign Off	99	97
	Average Greeting Skills	95	90
	TOTAL GETTING THROUGH INDEX	44	45
Service Delivery Index (100)	Agent Manner (50)		
	Interested, Warm & Helpful	72	64
	Businesslike & Unemotive	27	34
	Total Acceptable	99	98
	Disinterested /Curt	1	2
	Laidback /Easygoing	1	0
	Total Unacceptable	2	2
	Enquiry Resolution Skills (50)		
	Clarified Needs	80	83
	Good Product Knowledge	90	89
	Clear Resolution to Query	87	78
	Courteous & Helpful	86	82
	Average Enquiry Resolution Skills	86	83
	TOTAL SERVICE DELIVERY INDEX	70	67
OVERALL PERFORMANCE SCORE (200)		114	112

Simply Energy Customer Service Score (Hardship Calls)



Similar to Origin Energy, Simply Energy's scores for most measures were similar to Retailers Average.

- The only Greeting Skills measure where the score was not comparable to Retailers Average was Company Name (27 points lower).
- The Interested, Warm and Helpful Manner score was lower than Retailer Average by eight points.
- Focusing more on providing an Interested, Warm and Helpful manner, rather than a Businesslike and Unemotive manner, will improve the customer experience at Simply Energy.
- All Enquiry Resolution Skills criteria recorded a score lower than Retailers Average, except for Good Product Knowledge (on par) and Clarified Needs (three points higher).
- Simply Energy's Connect Time was 24 seconds faster than the Retailers Average.

Hardship Calls

Results by Retailer: Simply Energy

Customer Service Non-Index		All Surveyed Retailers Average (excl EA)	SIMPLY ENERGY
Service Delivery Non-Index	Communication Skills		
	Matched Speech	91	92
	Correct Grammar	99	99
	Patient & Tolerant	85	87
	Avoided Interrupting	93	92
	Developed Rapport	74	68
	Maintained Contact	96	95
	Projected Confidence	93	88
	Avoided Slang/Jargon	99	100
	Average Communication Skills	91	90

Again similar to Origin Energy, Simply Energy was generally on par with Retailers Average across Communication Skills.

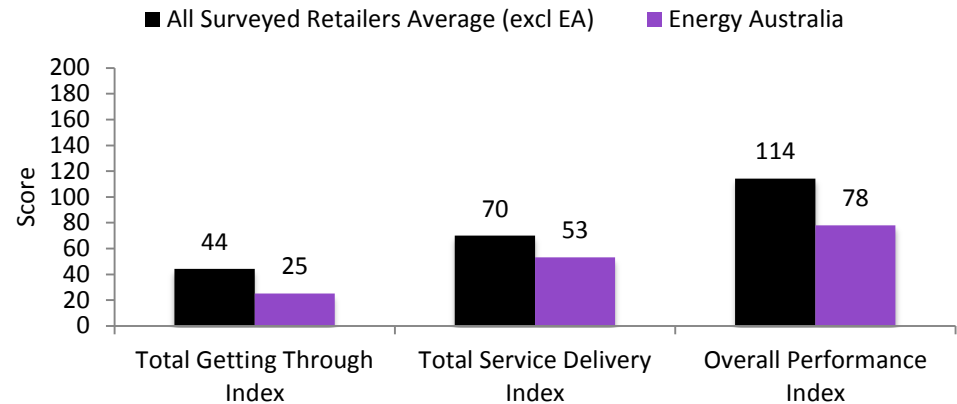
- Developed Rapport and Projected Confidence were the two measures where scores were noticeably lower than Retailers Average (both by five points).
- Developed Rapport achieved the lowest score at 68%, and this could be a focus for improvement at Simply Energy.

Hardship Calls

Results by Retailer: EnergyAustralia

Customer Service Index		Energy Australia
Successful calls %		38
Unsuccessful calls %		62
Getting Through Index (100)	Connect Time (60)	
	Connect Time (in seconds)	357*
	Greeting Skills (40)	
	Salutation	100
	Company Name	100
	Agent Name	100
	Offer to Help	95
	Sign Off	100
	Average Greeting Skills	99
	TOTAL GETTING THROUGH INDEX	25
Service Delivery Index (100)	Agent Manner (50)	
	Interested, Warm & Helpful	94
	Businesslike & Unemotive	6
	Total Acceptable	100
	Disinterested /Curt	0
	Laidback /Easygoing	0
	Total Unacceptable	0
	Enquiry Resolution Skills (50)	
	Clarified Needs	97
	Good Product Knowledge	92
	Clear Resolution to Query	92
	Courteous & Helpful	95
	Average Enquiry Resolution Skills	94
	TOTAL SERVICE DELIVERY INDEX	53
OVERALL PERFORMANCE SCORE (200)		78

EnergyAustralia Customer Service Score (Hardship Calls)



CSBA experienced substantial difficulty in getting through to EnergyAustralia during the first few weeks of the survey therefore, to increase the probability of completing some calls, the Maximum Wait Time was extended to 8 minutes.

At Overall performance level, the high proportion of unsuccessful calls markedly decreased the Getting Through, Service Delivery and Overall score for Energy Australia.

- Calls exceeding eight minutes Maximum Wait Time amounted to 62%.
- The average call took around 6 minutes (357 sec) to connect.

However, when callers were able to get through to Energy Australia, they received a very high level of service.

- At the individual measure level, EnergyAustralia performed particularly well on Warm, Interested and Helpful Manner, and Clarified Needs.

*The extended Maximum Wait Time of eight minutes means EnergyAustralia's performance results are not directly comparable to calls and performance of other retailers that were subject to the standard Maximum Wait Time of four minutes.

Hardship Calls

Results by Retailer: EnergyAustralia

Service Delivery Non-Index	Customer Service Index	Energy Australia
	Communication Skills	
	Matched Speech	100
	Correct Grammar	97
	Patient & Tolerant	98
	Avoided Interrupting	100
	Developed Rapport	94
	Maintained Contact	95
	Projected Confidence	95
	Avoided Slang/Jargon	100
	Average Communication Skills	97

EnergyAustralia delivered a very strong performance across all aspects of Communication Skills.

- A perfect score was observed for Matched Speech, Avoided Interrupting, and Avoided Slang or Jargon.
- All other measures received a high score of at least 94%.

APPENDICES

Appendix 1

Examples of Scenarios for General Calls

Scenario Number	Scenario
1	How will the carbon tax affect my bill?
2	If I were to sign up to your company as my energy provider, would there be a cooling off period? If there is one, how long is it?
3	How long are your standard energy contracts and is there a disconnection fee?
4	Do I have to sign up to a contract for my energy supply with your company or is there a more flexible option?
5	Do you offer discounts for people who own more than one property?
6	Are there any other ways of receiving my bills than paper bills sent in the post?
7	Do you have a green energy program? Can I have some information about it?
8	Can you please give me some information on how to reduce my energy bills?
9	I'm trying to gather some information about solar electricity. Can you please give me some information about it?
10	Is it possible for me to have my gate or meter box locked? What do I need to do?

Appendix 2

Examples of Scenarios for Hardship Calls

Scenario Number	Scenario
1	I'm on the dole and we live in a commission house. Pretty much it's a struggle at the end of each fortnight, before the next Centrelink payment comes in. Then when utility bills come in, we end up not really having any food on the table. Is there anything you can do to help?
2	I am going through a rough patch at the moment. I'm suffering from chronic fatigue and can't really work much. The incoming bills are mounting. Is there any help I can get with the bills?
3	I am going through a rough time. I'm undergoing treatment for cancer and can't really work much. The bills just keep on coming. What can I do?
4	I am going through a difficult time. I'm suffering from depression and can't really work much. I don't know how to handle the mounting pile of bills. Can you help me?
5	I am going through a tough time. I'm recovering from an accident and can't really work much. The bills are starting to be a real problem. How do I deal with this?
6	We're going through a difficult situation at the moment. My husband/wife/parent has passed away. We are really struggling to make ends meet, let-alone pay bills. Do you have any suggestions as to what I can do?
7	I've just been put on a sickness benefit and will be getting a health care card. Will this help with reducing my bills? I can't manage anymore and I'm really worried.
8	I've got a student card/veterans card. Would this entitle me to any help with my bills? I'm struggling to manage and I'm really worried.
9	I am going to be on Centrelink benefits soon (single parent pension/disability pension health care card) and heard about some sort of discount for utility bills. Can you tell me what that is?
10	I am going to be on Centrelink benefits soon (single parent pension/disability pension/health care card) and heard about some sort of discount for utility bills. Is that Centrepay? Can you tell me how that works?

Appendix 3

CSBA Telephone Assessment Criteria

Group	Subgroup	Detail
CONNECT TIME	Connect Time(sec)	From the moment a CSBA agent dials the number to the time they speak to an operator.
GREETING SKILLS	Salutation	The Agent answered the call with an appropriate welcome, such as "Good morning" or "Welcome to company X".
	Company Name	Agent stated company name.
	Agent Name	Agent provided name unprompted.
	Offer to Help	The Agent made an offer to assist the caller, such as "How may I help you today?".
	Sign Off	Means that at the conclusion of the call the Agent thanked the caller, and said "Goodbye" or similar.
AGENT MANNER	Interested, Warm and Helpful	Conveys a manner that has a 'smile in the voice' and really sounds enthusiastic. There is emotion in the tone, which enables the Agent to reach out to the caller.
	Businesslike and Unemotive	Means that the Agent was courteous and professional but was not really reaching out to the caller.
	Laidback or Easygoing	Represents a manner that is too casual and a little offhand, without being rude.
	Disinterested or Curt	Conveys a manner that is clearly not interested in the caller, and may even be downright rude in responding to the enquiry.

Appendix 3

CSBA Telephone Assessment Criteria (cont'd)

Group	Subgroup	Detail
ENQUIRY RESOLUTION SKILLS	Clarified Needs	Means the Agent made an attempt to clearly understand what the enquiry was about.
	Good Product Knowledge	Refers to an Agent who was on top of their subject, with information at hand, and clear, unambiguous answers.
	Clear Resolution to Query	The Agent provided a resolution that adequately and clearly resolved the enquiry.
	Courteous and Helpful	Refers to an Agent who was polite and patient, and wanted to assist the caller.

Appendix 3

CSBA Telephone Assessment Criteria (cont'd)

Group	Subgroup	Detail
COMMUNICATION SKILLS	Matched Speech	The Agent's volume and speed of speaking matched that of the caller's.
	Correct Grammar	The Agent spoke in a manner that displayed a good understanding of the English language, with clearly constructed sentences.
	Patient and Tolerant	The Agent was willing to take time with the customer to ensure that the enquiry was fully understood.
	Avoided Interrupting	The Agent waited until the caller had finished speaking before responding and did not cut the caller off mid-speech.
	Developed Rapport	The Agent built a relationship with the caller during the call, demonstrating an understanding between them and establishing a connection.
	Maintained Contact	The Agent maintained contact during the call, such as when looking up information. This can include putting the caller on hold while they research, to avoid long periods of awkward silence.
	Projected Confidence	The Agent sounded confident in the information they were issuing. Their tone was positive and they were not hesitant with their knowledge.
	Avoided Slang or Jargon	The Agent's response was easy to follow without the use of colloquial expressions, sloppy English or complicated technical terms.

Appendix 4

Verbatim Comments: Examples of Good Practice

The Agent demonstrated an excellent understanding of the subject matter. She was able to resolve the caller's enquiry in a clear and concise manner. She came across as very helpful, and she seemed very interested in helping the caller find a resolution to the enquiry.

A very sales-orientated Agent who was observant and informative. She took the initiative to explain company offers and did not give in to the caller's indifference. Moving on to provide additional and more suitable options, the Agent was accessible and supportive, demonstrating a clear understanding of the topic and conveying information with skill.

The Agent asked an amplitude of opened-ended questions, exploring the caller's needs and requirements. She was well versed in the product information. It was evident that the Agent showed an underlying empathy, which was more than admirable.

The Agent was investigative and conversant. She was clearly well acquainted with the topic and offered the caller several options. Her prompt response demonstrated skill and confidence, and she made the effort to resolve the enquiry clearly.

The Agent clearly understood what the enquiry was about, not hesitating when responding to the questions. She showed sound product knowledge, and as a result the matter was resolved. She was very affable and supportive in her approach to the situation.

Verbatim Comments: Examples of Good Practice (cont'd)

An extremely friendly and upbeat Agent with a positive attitude – the Agent was able to provide genuine assistance. She was helpful and willing to go the extra mile to help the caller. She was impressive with her work rate and her ability to provide an efficient service.

A conscientious Agent who was inquisitive and attentive. She was very polite and generous with her answers. Her understanding and forthcoming approach was affirming and made the call feel personal.

The Agent spoke warmly as he used the appropriate pleasantries to develop a rapport. He was affable and accommodating, listening intently to the caller and answering professionally.

Developing a rapport throughout the call, the Agent was patient in explaining the many options that were available for the caller's query as possible resolutions. The Agent's behaviour displayed patience, as he did not rush the caller, instead displaying a willingness to help. Professional and courteous throughout, the Agent handled the delicate situation with charisma and tact.

Projecting an amiable and cooperative tone during the call, the Agent gave a sense of reassurance to the caller. This helped in creating a positive connection with the caller, which supported the information provided.

Verbatim Comments: Examples of Room for Improvement

The Agent failed to clarify the caller's needs by asking appropriate questions. She did not show good product knowledge, as she could not answer the question. She was not accommodating or kind, and she failed to resolve the query.

At times it didn't seem like the Agent really understood the caller's enquiry. She wasn't able to offer much of a resolution, only repeat the same information over and over again. The Agent wasn't incredibly helpful in her approach to the enquiry and didn't probe the caller to ascertain what the caller was actually asking about.

The Agent's response was extremely poor. He failed to identify that the caller's enquiry had to do with a veterans card. Instead, he seemed intent on learning about the caller's account details and unwilling to provide generalist advice. The caller ended the call no better informed than when the telephone number was first dialled.

The Agent didn't really listen to the caller's enquiry at all – he just jumped straight into a sales pitch to try to sign the caller up. The caller had to repeat the enquiry several times before the Agent finally gave the caller the information they were after.

The Agent showed no motivation to immerse himself in the caller's situation and to understand the specific problems facing them. The caller was left to do the work of extracting information out of the Agent.

Verbatim Comments: Examples of Room for Improvement (cont'd)

The Agent didn't try incredibly hard to reach out to the caller – he didn't really build much of a rapport at all. The Agent didn't seem confident with his answers and kept on saying he wasn't sure how it all worked. There were times where he talked over the caller.

The Agent provided the explanation to the caller's query in a disconnected manner – his sentences did not flow. The Agent's rate of speech was uneven, and he left long pauses of silence as the caller was left to contemplate the Agent's short and abrupt response. No rapport was developed through this call, as there did not appear to be any intention to connect or empathise from the Agent.

The Agent was not impolite initially, but became rather impatient with the caller upon the call's progression. She was persistent in transferring the caller to the credit team in order to set up a plan, and it took her a while to offer the explanations that the caller was requesting. By the end of the call she seemed flustered.

The Agent was dismissive and unreceptive. He failed to demonstrate patience or empathy towards the caller, and was not very accommodating. He failed to embrace the call and assist the caller in a warm and friendly manner.

Throughout the conversation the Agent didn't establish a connection with the caller. Initially she seemed perplexed by the enquiry and was eager to transfer the call, which didn't inspire confidence in her skills.

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