

Switched-On! Customer Survey 2021

BSC Panel

Report & debrief

9th December 2021

What we are covering today

- Some context
- Key headlines
- Detailed feedback
 - What are our customers' priorities?
 - Overall picture
 - Focus on specific areas; Comms, OSMs, BSC change, Digital future, Committees and Performance Assurance
- Key implications for Elexon

This year's survey in summary

- N=100 quantitative interviews with customers and key industry stakeholders, via a mixed-mode methodology:
 - 47 completed wholly or partly online (including 8 part online/ part phone)
 - 53 interviewed entirely by phone
- Using a list of 517 contacts supplied by ELEXON.
- Companies that ceased trading during the period were removed from the original contact list.
- Survey of 15 to 20 minutes duration (depending on mode and level of engagement with Elexon).
- All fieldwork completed between Friday 17th September and Tuesday 26th October 2021.

Survey content

Respondent profile & background

Overall feedback

Focused modules:

Communications

OSMs

Change

Digital future

Committees

Performance Assurance

Key headlines

Overall Elexon has regained some sense of improvement over the past year, but views of their contribution at an industry level have weakened somewhat amongst the medium-sized and larger participants.

Quality, reliability and expertise remain the most valued aspects of Elexon's service, but the speed of service has also emerged as a key factor this year.

Elexon's **Net improvement** score has recovered significantly from the fall seen during Covid. This is mainly attributed to its support of change and engagement with the industry, but greater understanding of party needs and knowledge of the code are still desired.

Overall Satisfaction levels remain consistently high (and improved amongst smaller organisations). Elexon is rated less well by medium organisations, who also give a lower rating this year for '**facilitating industry debate & decision making**'.

Net Advocacy remains unusually low, but less polarised this year. This coincides with a marked fall in rating of Elexon's **Value for Money**. Both trends are most pronounced amongst larger organisations. The main criticism is loss of expertise, but outweighed by positive feedback on the same theme.

Key headlines – specific areas

Communications

Perceptions of quality of communication remain overwhelmingly positive. More claim to be using webinars and the websites. Simplification is the main improvement desired.

OSMs

Rating of OSMs has improved. Whilst some feel improved communication and proactivity are needed, many feel OSMs are making more effort to understand their business and respond appropriately.

BSC Change

Whilst many appreciate the quality of CPs and the focus on customers, ratings of the change process and its communication after the point of decision are weaker (especially quality & timing of communication).

Digital future

As familiarity and understanding has grown, the appetite to learn more has faded. However, there is still widespread interest in getting updates, a roadmap and explanation of the end benefits.

Committees

Feedback has been very positive overall. Better detail and quality of papers remains the main improvement desired, but also the area where improvement in the past 12 months is most appreciated.

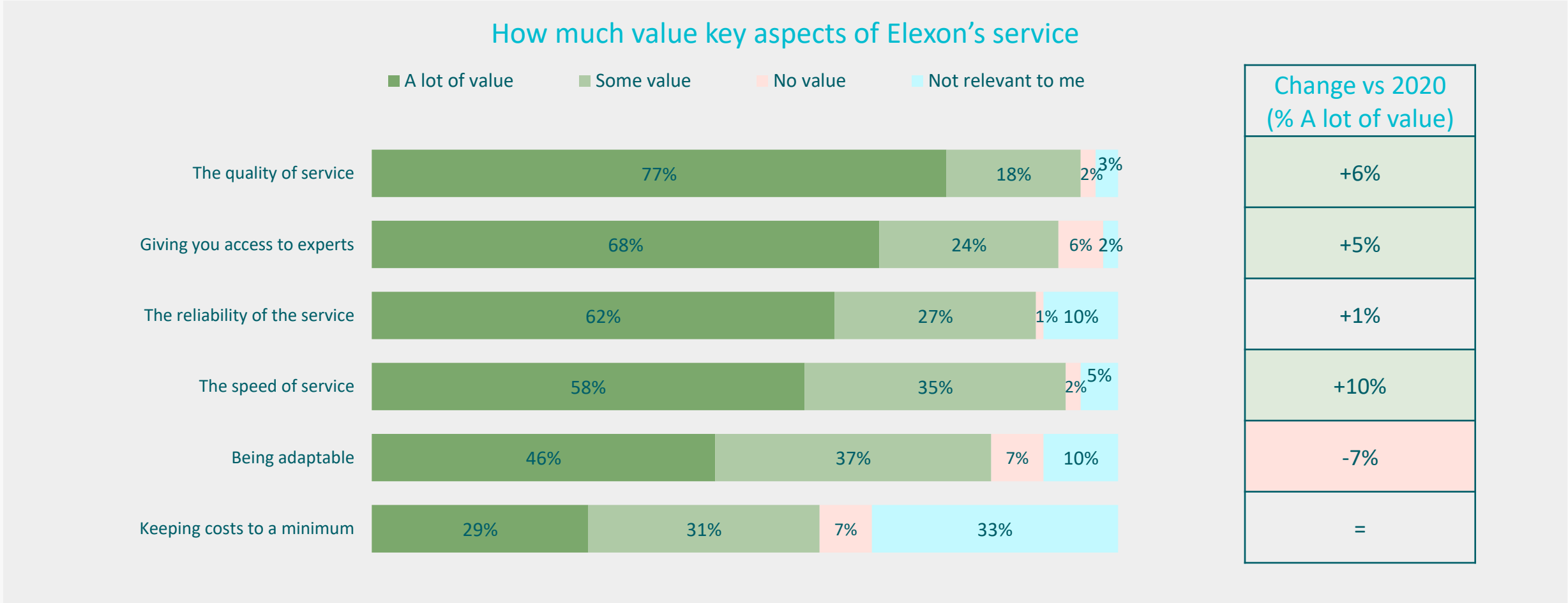
Performance Assurance

Rating of the PA process and communication remains very positive. Larger companies are slightly less positive this year, with a handful disappointed that certain planned changes did not materialise

Detailed feedback

What are our customers'
priorities?

Quality and reliability of service, along with access to expertise, remain the top priorities from Elexon’s service, but more participants are placing importance on the speed of service provided.



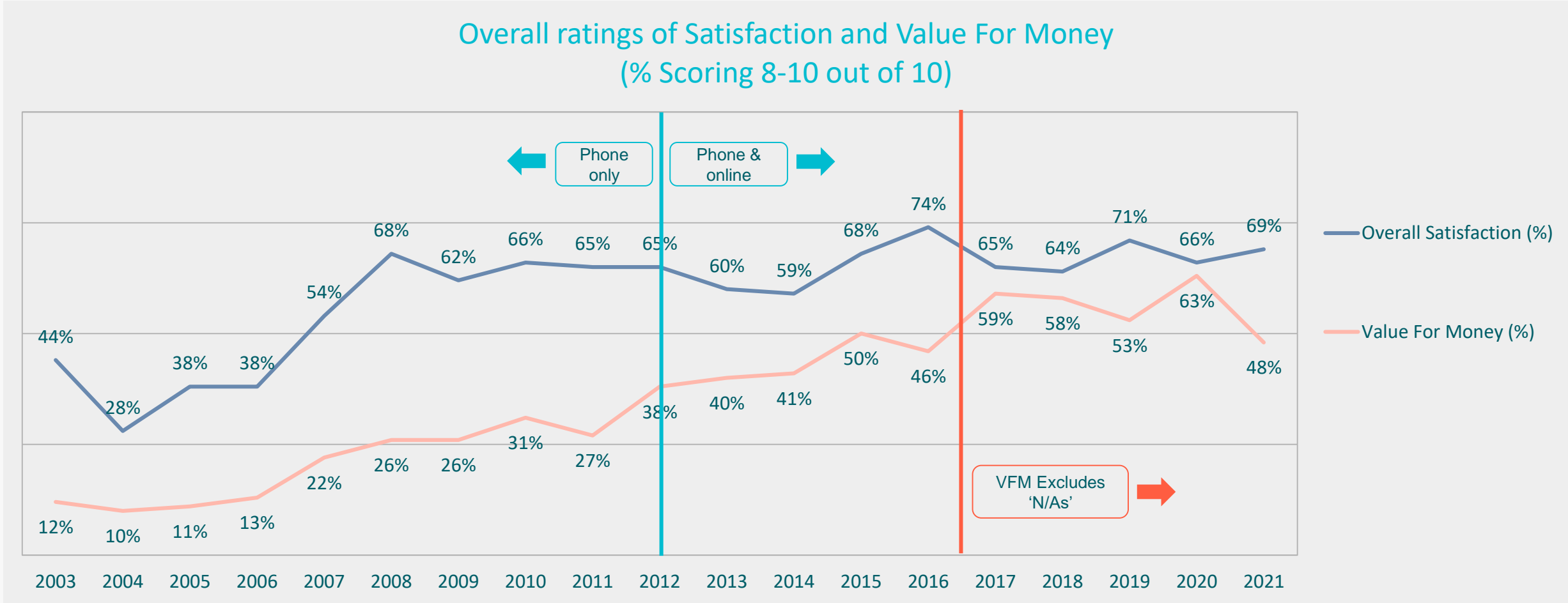
QB9: How would you value each of the following aspects of ELEXON’s service?

Base: Total sample (100/90)

Detailed feedback

Overall picture

Overall Satisfaction remains highly consistent but VFM scores have dropped back significantly from the unusually high levels observed in 2020.

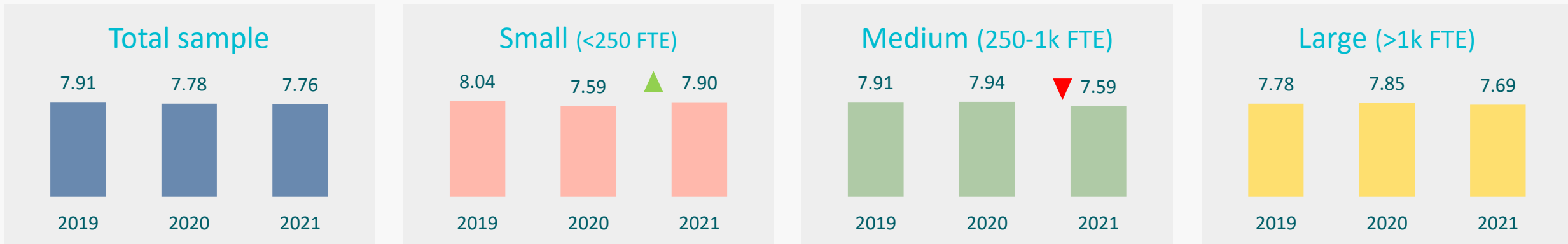


QB2: Thinking about all your dealings with ELEXON, how would you rate them overall?
QB5: And what do you feel overall about ELEXON in terms of the value for money they provide?

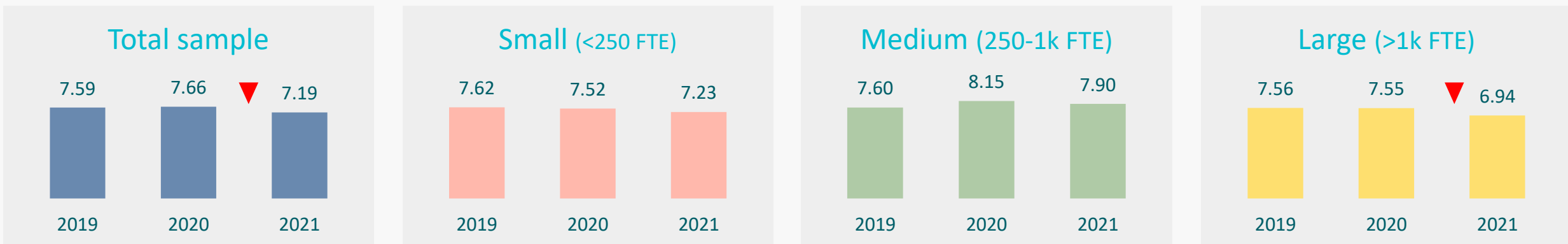
Base: Total sample (varies by wave)

Falls in VFM scores have come across all company sizes, but have been sharpest with larger participants.

Overall satisfaction (Mean scores out of 10)



Value for money (Mean scores out of 10)

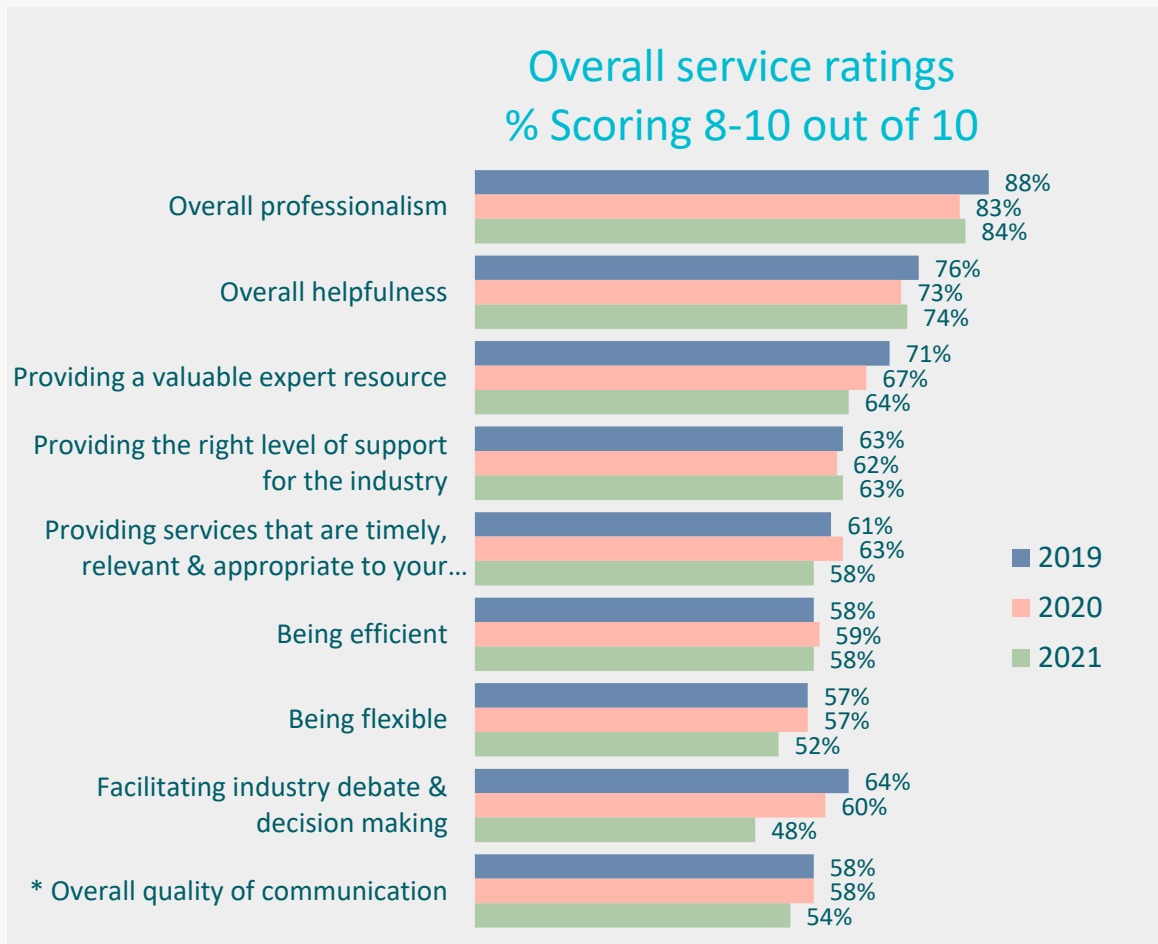


QB2: Thinking about all your dealings with ELEXON, how would you rate them overall?
QB5: And what do you feel overall about ELEXON in terms of the value for money they provide?

Base: Total sample (112/90/100)/ Small (45/32/41)/ Medium (22/18/17)/ Large (45/40/42)

Elexon Switched-On! Customer Survey 2021

Participants are clearly less positive this year about Elexon's role in facilitating industry debate and decision making. Flexibility and timely services are also being rated marginally less well.



Overall Service Ratings % scoring 8-10 out of 10	Change 2021 vs 2020	Change 2021 vs 2019
Overall professionalism	+1%	-4%
Overall helpfulness	+1%	-2%
Providing a valuable expert resource	-3%	-7%
Providing the right level of support for the industry	+1%	=
Providing services that are timely, relevant & appropriate to your business	-5%	-3%
Being efficient	-1%	=
Being flexible	-5%	-5%
Facilitating industry debate & decision making	-12%	-16%
* Overall quality of communication	-4%	-4%

QB1: We'd like you to rate ELEXON on several attributes on a scale of 1 to 10, with 1 being poor and 10 being excellent. Just to remind you we only want you to think of your dealings with ELEXON in the last 12 months in relation to the BSC.

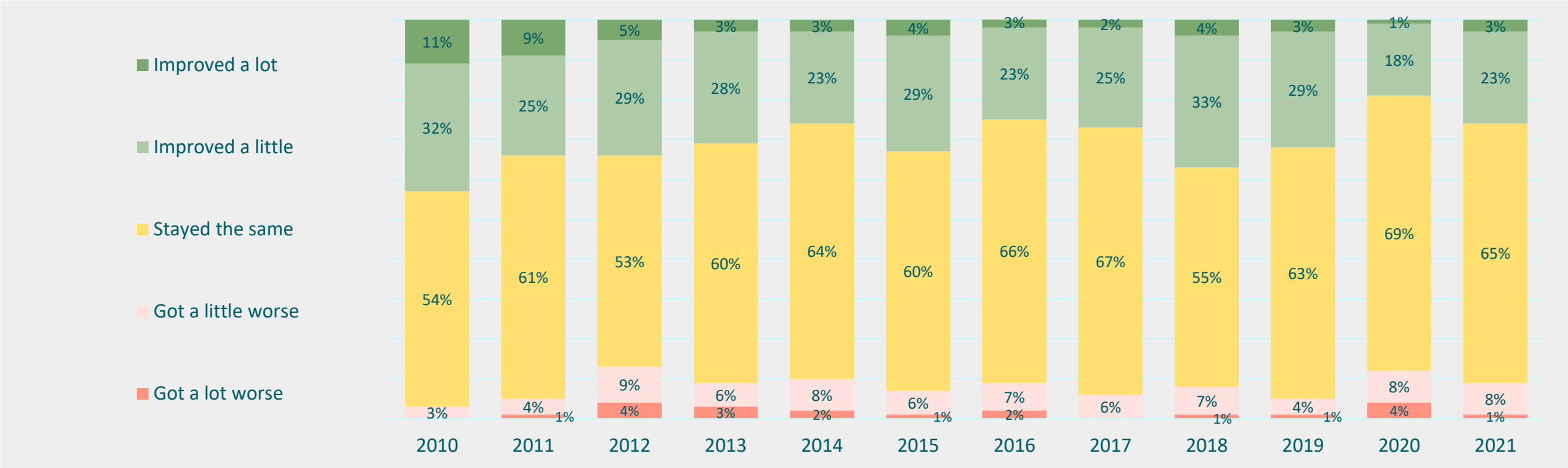
QC1 How would you rate ELEXON in terms of its overall quality of communication?

Base: (112/90/100), *Completed comms module (82/77/92)

The sense that Elexon has improved is recovering from the notable decline we saw following the cyber attack and outbreak of Covid last year.

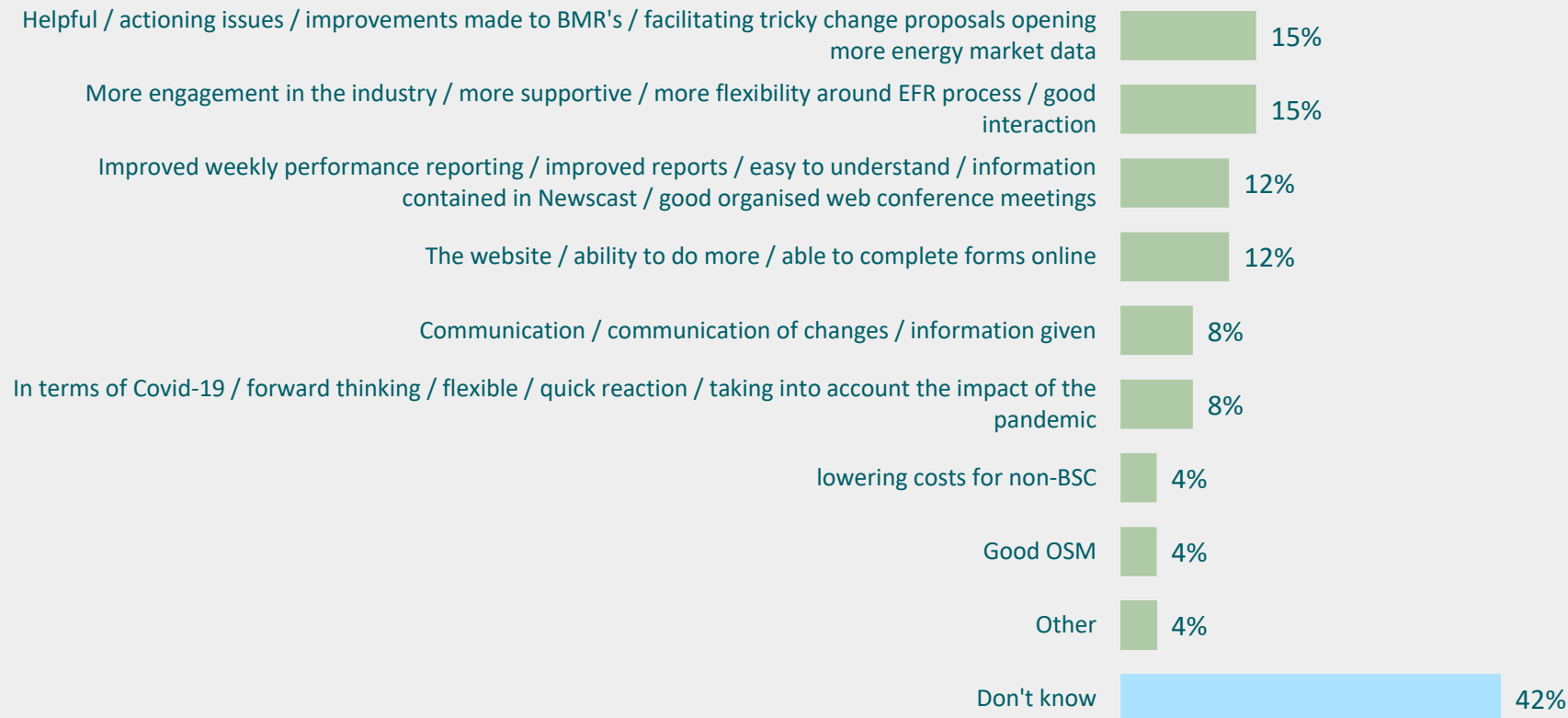
How Elexon’s service has improved over the past 12 months

NET Improvement	% Improved – % worse	+40%	+29%	+21%	+21%	+18%	+26%	+17%	+21%	+29%	+26%	+7%	+17%
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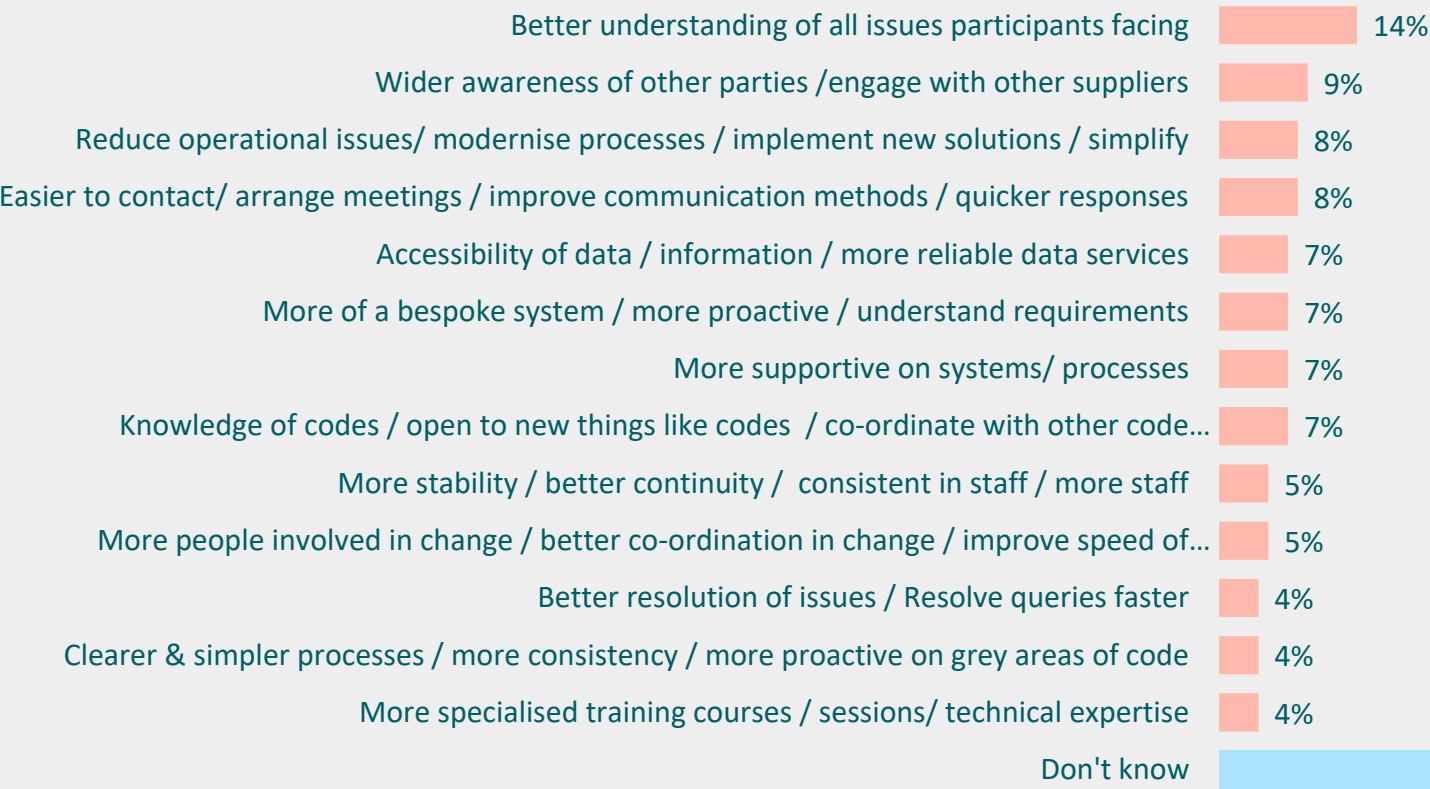
Despite weaker ratings of Elexon's support for industry debate & decision making, its general engagement and support of industry change has been appreciated as a key area of improvement

What feel Elexon has particularly improved on in the past 12 months



A closer understanding of party needs and circumstances is the highest priority for improvement from Elexon, and within this knowledge of codes is being highlighted more often.

What would most like Elexon to improve on in the next 12 months



Of which...
24% People service issue
28% Systems service issue
23% Something else
30% Don't know

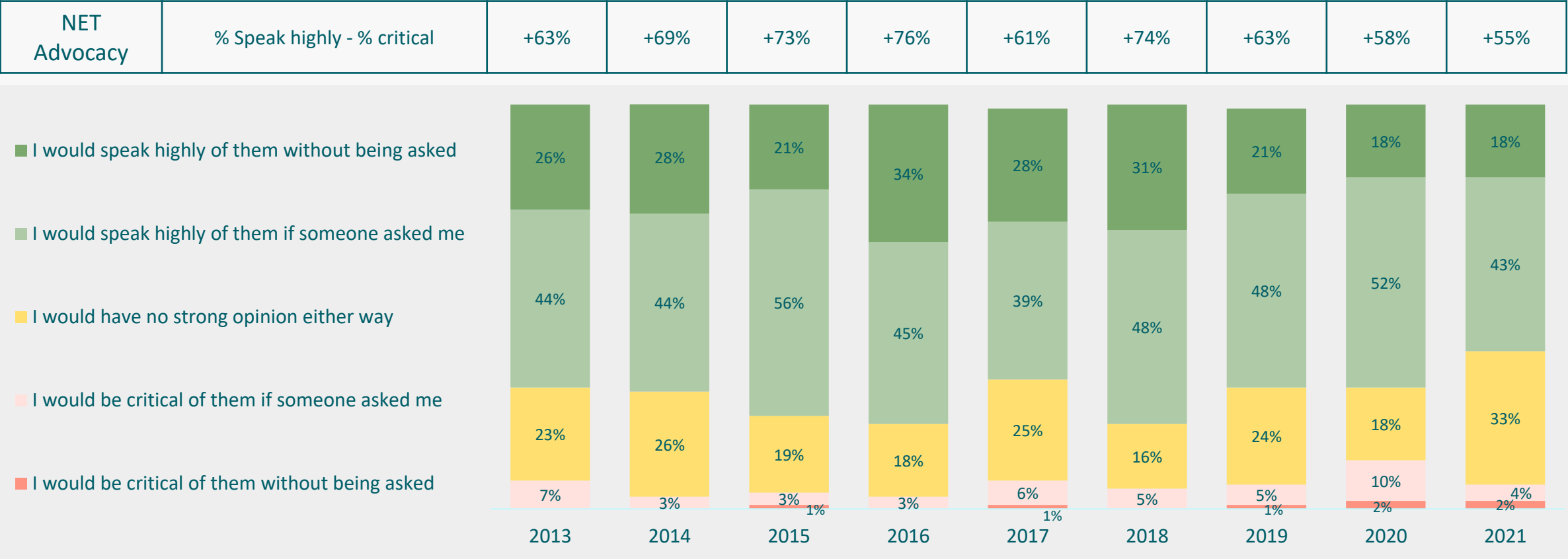
Change vs 2020
+7%
+8%
-3%
=
+4%
-4%
+3%
+7%
+2%
+1%
+3%
=
+3%
-11%

QB4b What, if anything, would you most like Elexon to improve on in the next 12 months?
QB4c: Thinking about where you would most like ELEXON to improve, would you say that this is mainly a 'systems' service issue or a 'people' service issue, or something else?

Base: All who think service has stayed the same/ got worse 2020 (73)/ 2021 (74)

NET Advocacy levels remain at the unusually low level that first kicked in with Covid, but attitudes are less polarised this year with only 6% being critical.

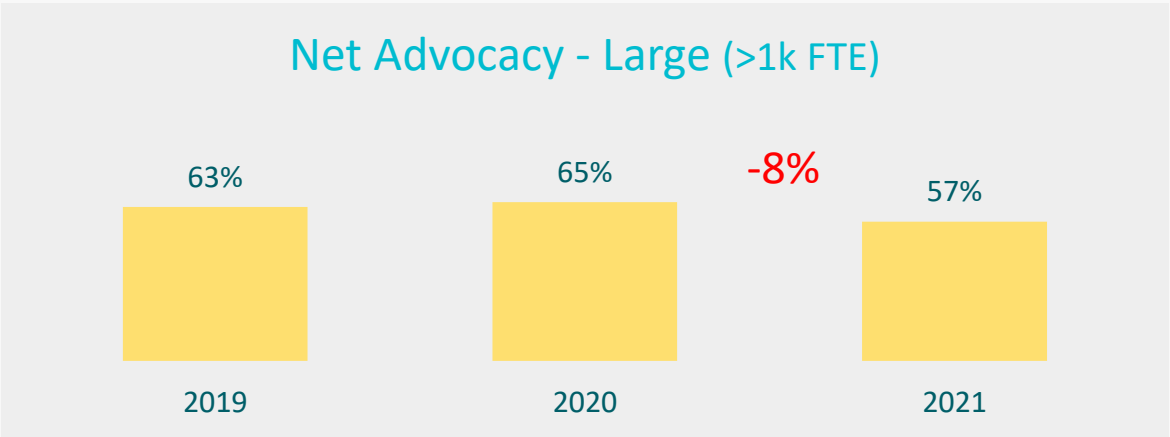
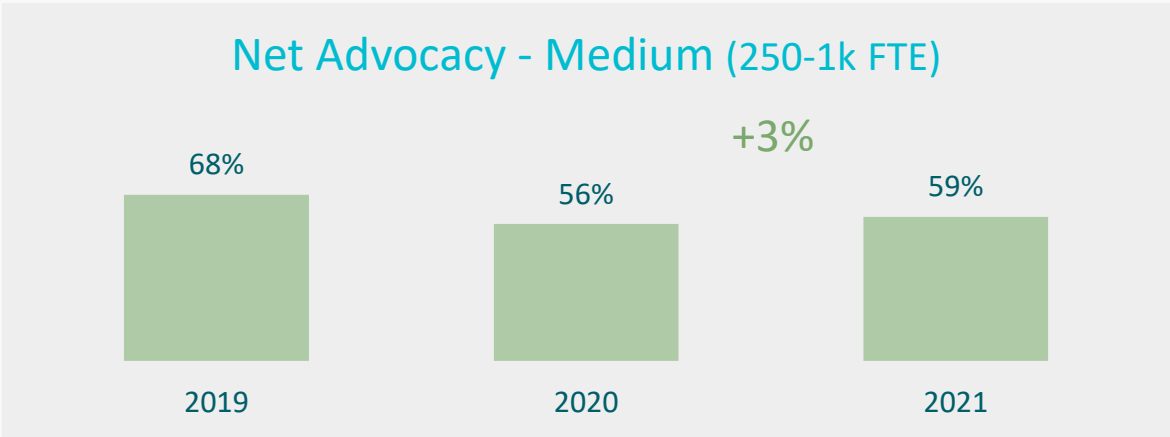
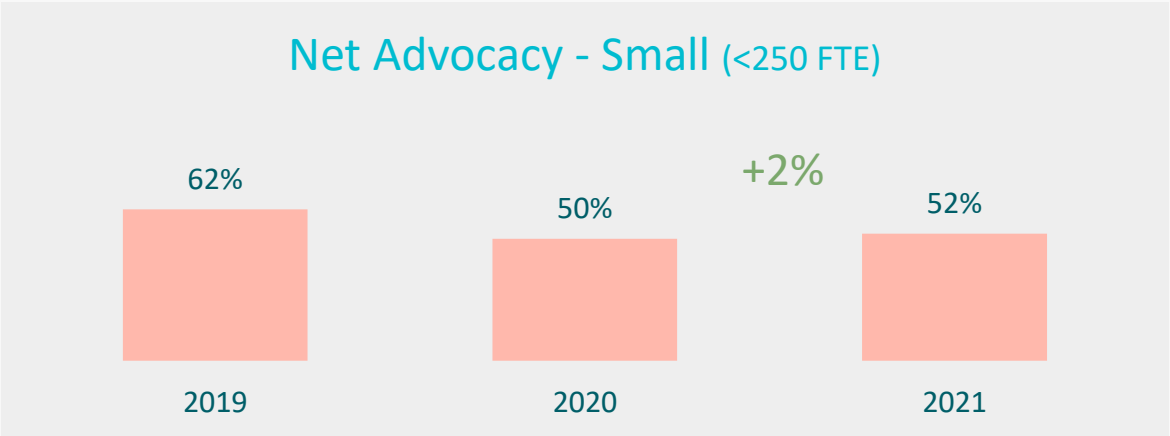
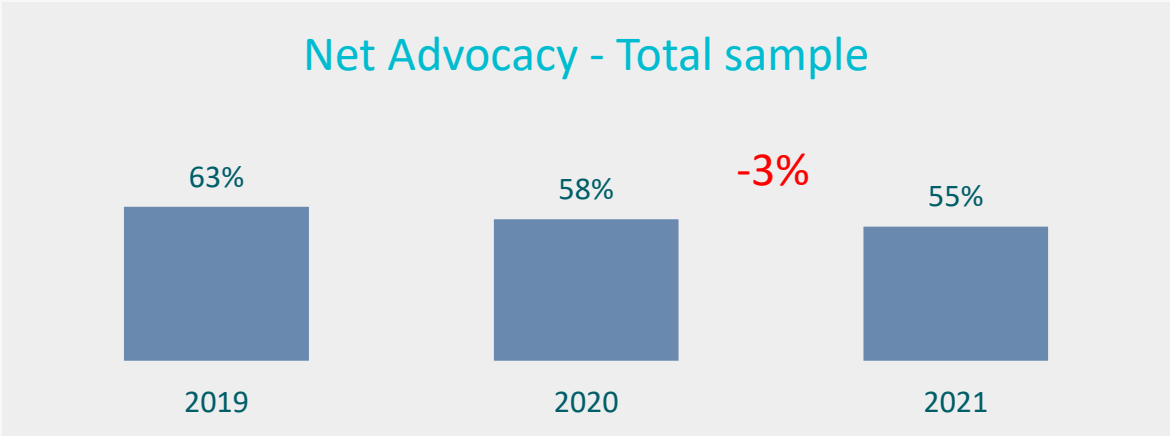
Advocacy – Total sample



QB6: I'd now like you to think about all of the experiences and perceptions of ELEXON that you have. If you were talking to a colleague about ELEXON which of these answers would best reflect your opinion of them?

Base: Total sample (varies by wave)

As with VFM, NET Advocacy has actually declined amongst larger participants, but not smaller-sized organisations.



QB6: I'd now like you to think about all of the experiences and perceptions of ELEXON that you have. If you were talking to a colleague about ELEXON which of these answers would best reflect your opinion of them?

Base: Total sample (112/90/100)/ Small (45/32/41)/ Medium (22/18/17)/ Large (45/40/42)

Good responsiveness has played a stronger role this year in driving positive advocacy of Elexon, by OSMs and in general.



QB7a You mentioned that you would speak highly of ELEXON. Please tell us why you would speak highly of them and what sort of things you would tell a colleague about ELEXON.
Base: All speaking highly of ELEXON (78/63)

Detailed feedback

Focus on specific areas;

Communications

OSMs

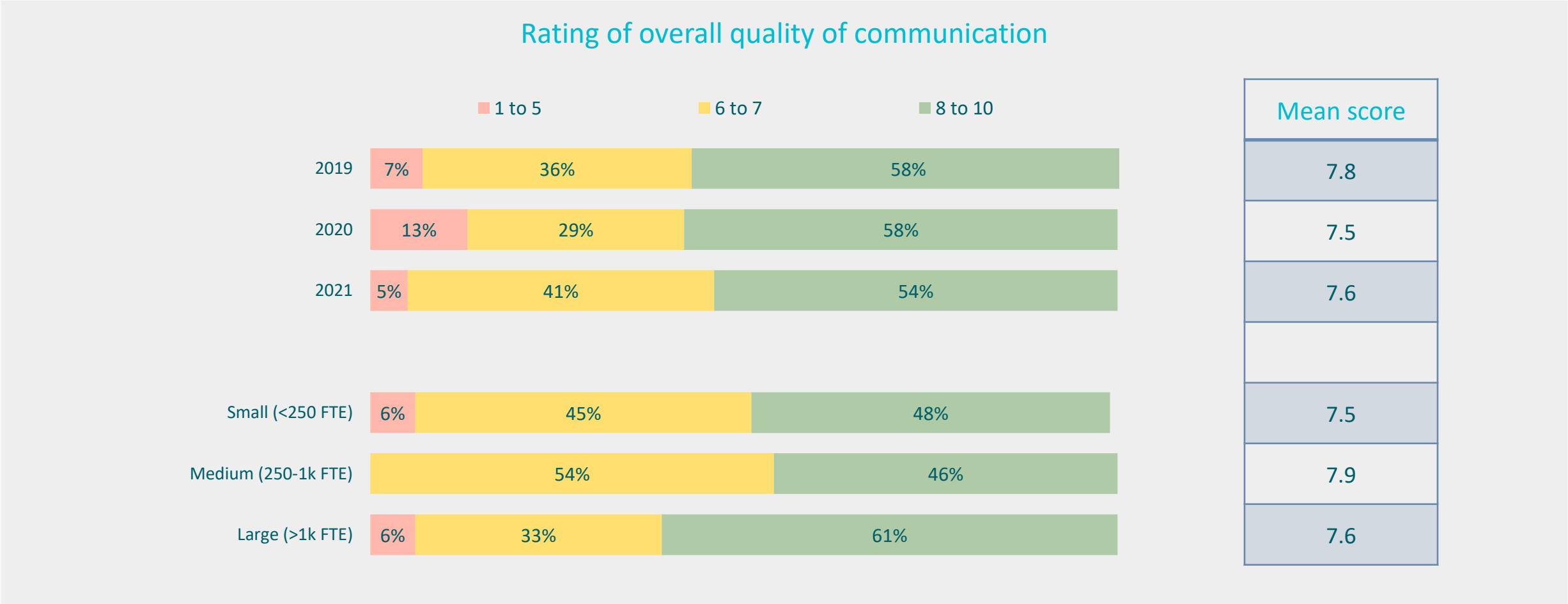
BSC change

Digital future

Committees

Performance Assurance

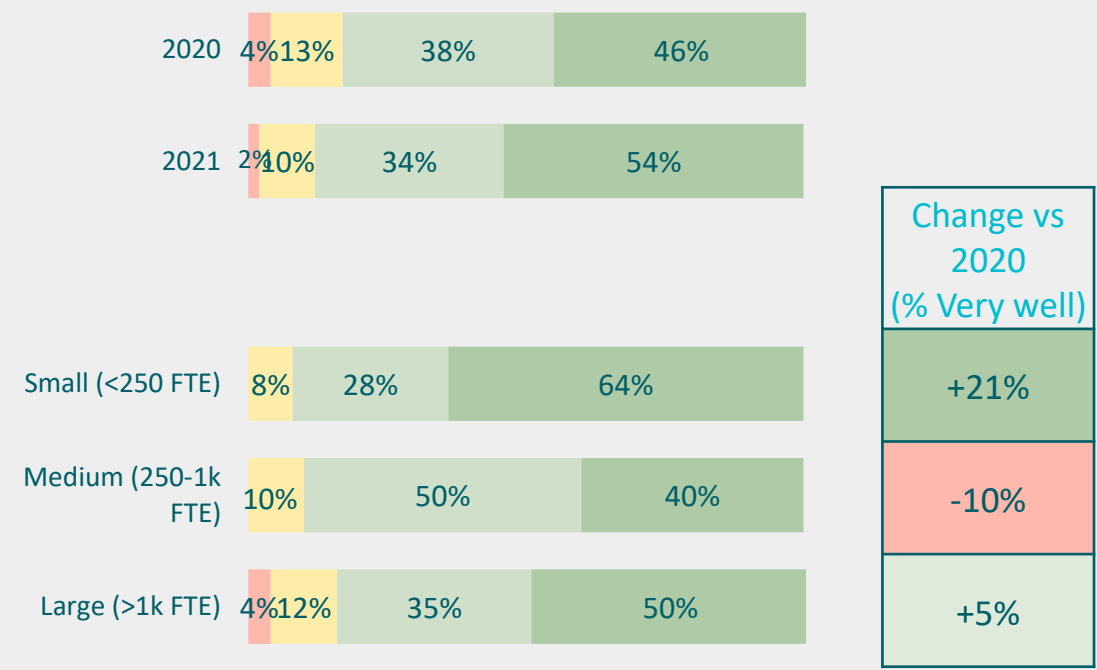
Communication: Rating of quality of communication has not really changed, but we are seeing fewer giving very low ratings. Simplification is the main improvement desired.



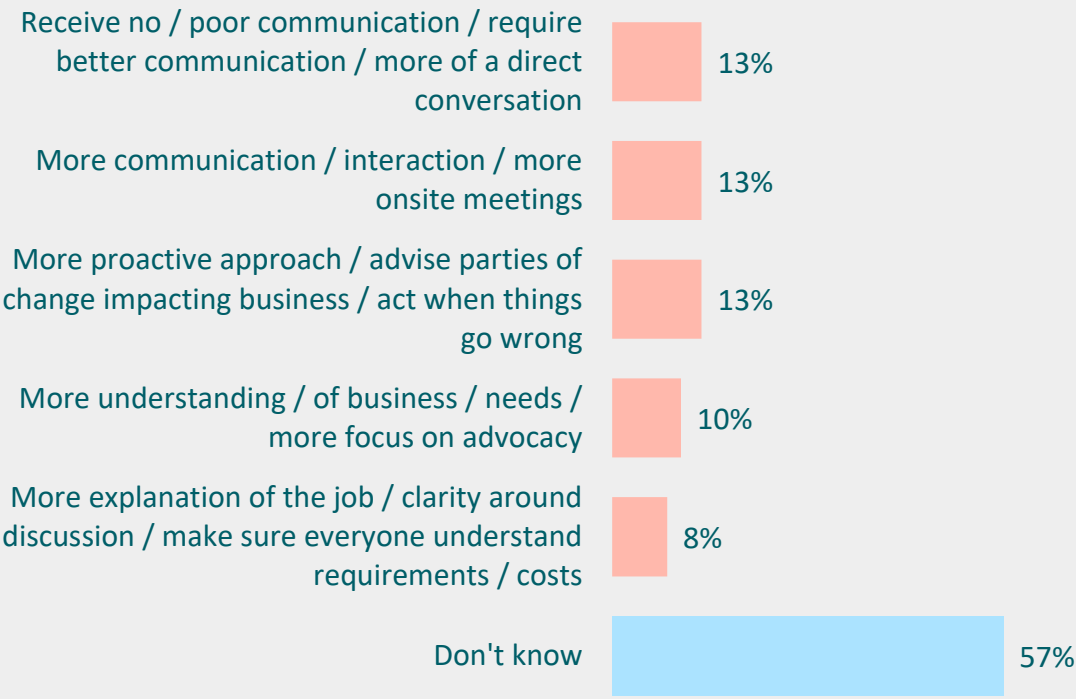
OSMs: Feedback on OSMs has improved. Whilst some feel improved communication and proactivity are needed, many feel OSMs are making more effort to understand their business and respond appropriately.

Overall rating of OSM

Not at all well (1) 2 3 4 Very well (5)



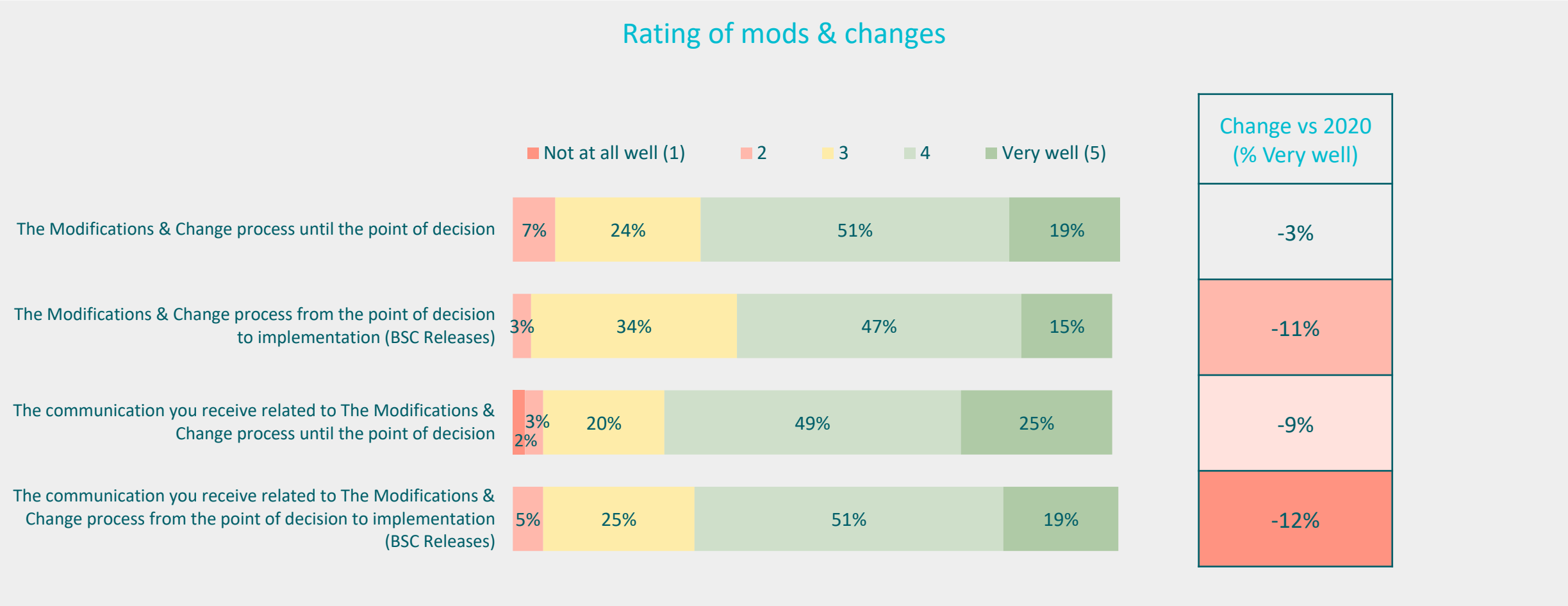
What would most like to see improved in terms of the OSM service



QD1: Overall, how well do you rate the service you receive from your current OSM?

Base: All completing OSM module 2020 (48)/ 2021 (61)/ (25)/ (10)/ (26)

BSC Change: Whilst many appreciate the quality of CPs and the focus on customers, ratings of the change process and its communication after the point of decision are weaker (especially quality & timing of communication)



QE2: Please tell us how you would rate ELEXON for its delivery of each of the following on a scale of 1 to 5, where 1 means 'not at all well' and 5 means 'very well'?
Base: All who are engaged in change process 2020(58)/2021(59)

BSC Change: What would most like to see improved - examples

“The process could benefit from a simple tracker, showing all changes raised, a short summary, who each change is impacting and how and where in the mods process each change is. This tracker could be shared on a monthly basis.”

“More communication from decision to implementation and what has been agreed and what impact of changes there will be.”

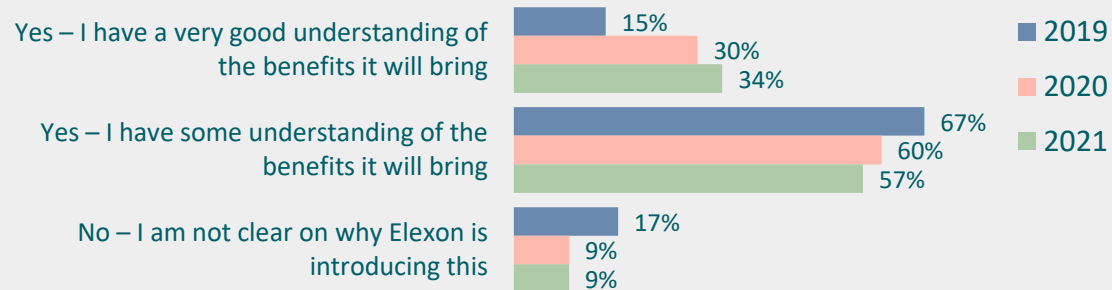
“Quicker progress and more timely meetings, but recognising that Covid-19 has impacted this over the past 18 months.”

“The OSM; there could be a segment where changes could be discussed, and pull any important points for us, help with all the information, get the balance right.”

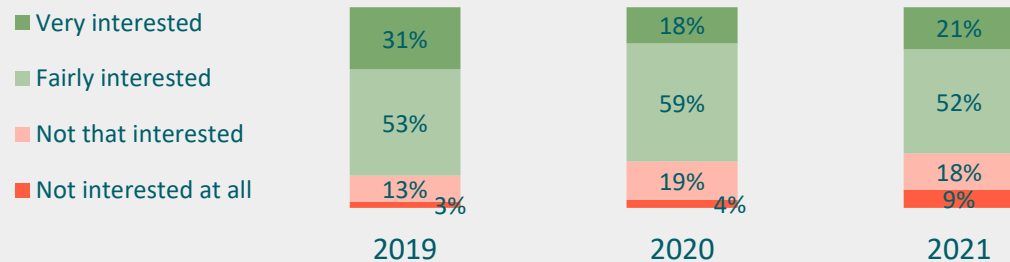
“It could be sped up, take a long time to be done, but it’s not Elxon’s fault, it’s other people that slow it down.”

Digital future: As familiarity and understanding has grown, the appetite to learn more has faded. However, there is still widespread interest in getting updates, a roadmap and explanation of the end benefits.

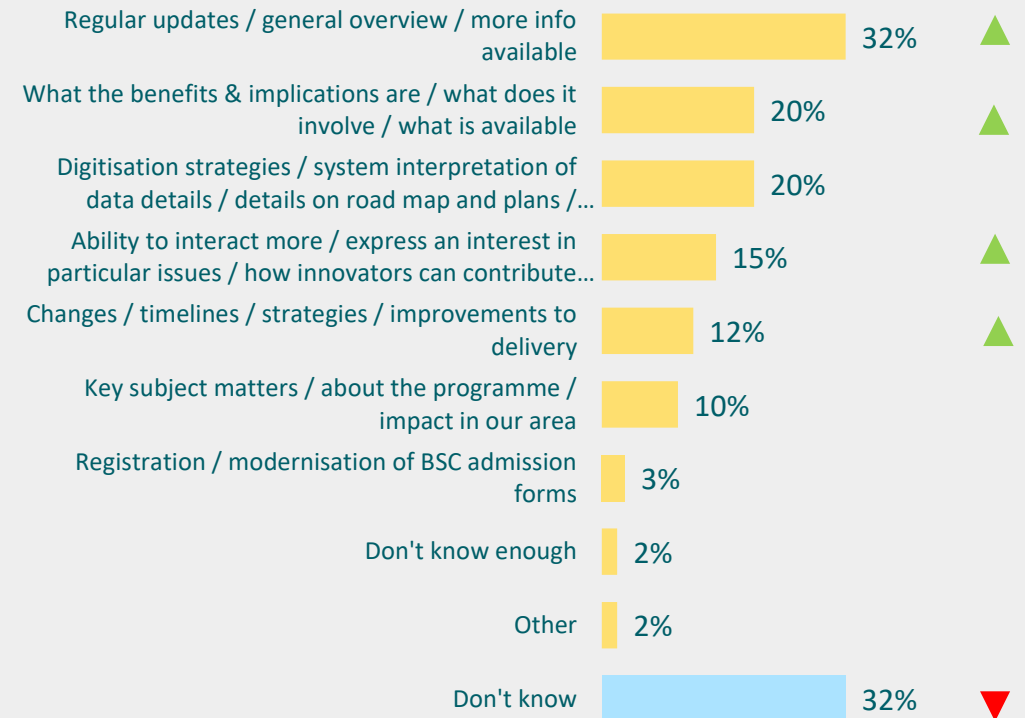
Understanding of need for digitalisation



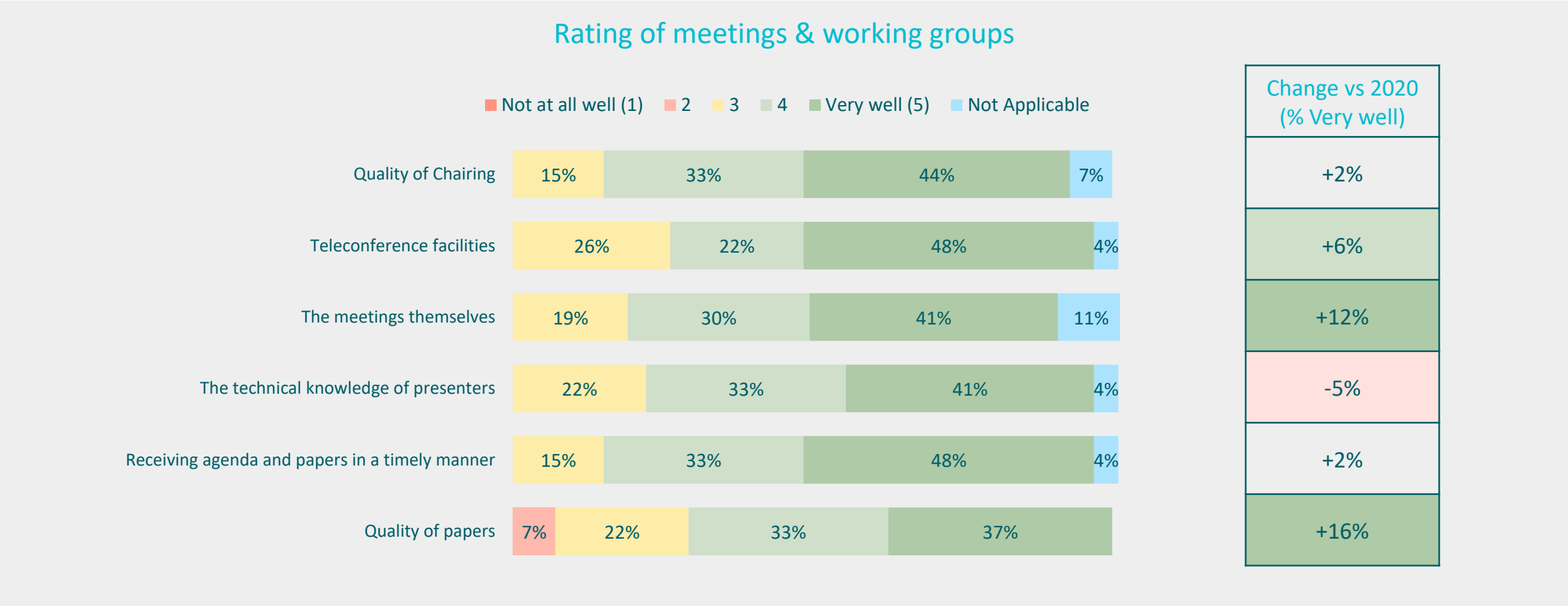
Interest in learning more about Elexon's digitalisation work – total sample



What would like more info about



Meetings: Feedback has been very positive overall. Better detail and quality of papers remains the main improvement desired, but also the area where improvement in the past 12 months is most appreciated.



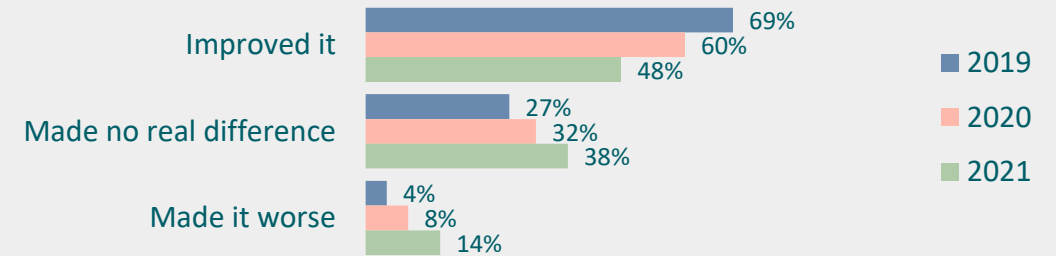
Performance Assurance: Rating of the PA process and communication remains very positive. Larger companies are slightly less positive this year, with a handful disappointed that certain planned changes did not materialise

27% noticed changes in the last year in the way Elexon is deploying the PAF

What changes noticed recently

More flexible / responsive / changes due to the Covid-19 situation/ virtual meetings	33%
Risk operational plan / risk matrix change/prioritization of risks/ REM changes more realistic	19%
New approach to the EFR / more rigorous chasing for parties in EFR	10%
Greater tolerance and understanding in what suppliers face/ little bit more pragmatic	10%
Other	14%
Don't know	14%

Impact of changes in the last year on the PAF



14% (3 people) said changes they'd expected had not materialised

"...We are not sure that the changes made to REM, ROP & RER are fully reflective in Audit scoping, activity & practices delivered by KPMG.."

"Transparency of Supplier & Supplier agent peer performance reporting."

"Promoting market half hour widely settlement form."

Key implications for Elexon

General implications and action areas

Current pillars of Elexon's success

- Quality of service
- Reliability of service
- Access to expertise and knowledge



Key action areas

- Keep eye on the ball/ don't let standards slip
- Continual improvement/ modernisation of systems
- Address concerns about loss of expertise and desire of stronger knowledge of the code

Building for the future

- Increasing expectations (from tech)
- Speed and adaptability
- Diverse customer needs and challenges



Key action areas

- Continually adapt/ modernise systems & processes
- Continue to deliver faster, more flexible service
- Work hard to understand individual customer needs

Key action areas – specific streams

Communications

- Clearer/ simpler communication
- Website/ portal improvements
- Ability to tailor communications to the user
- OSMs taking ownership of communication

OSMs

For a minority (often Larger Co.'s);

- better, more regular communication
- onsite meetings
- advising more proactively

BSC Change

- Review what's behind weaker rating of communication.
- Broaden and simplify content.
- Can more time be planned in pre and post decision to allow parties time to review, respond and plan?

Digital future

Continue to inform about;

- the roadmap & progress updates
- digitisation strategies
- end benefits/ implications

Accessible via the usual channels, but also events & social media

Committees

- Strive to further improve consistency, quality, detail and timeliness of papers
- Improve quality of chairing
- Improve technical knowledge of presenters

Performance Assurance

- Continue growing awareness of changes to PAF (and why any changes may not have materialised)
- More transparent/ open processes

Thank you

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