ENA/CSIRO Customer Engagement Handbook Structure and Content Notes – Draft for Feedback

Overview

This document provides an outline of the planned structure and content of a **Customer Engagement Handbook** that is being developed for use by energy network businesses. Throughout the document, there are specific questions included for your consideration and feedback.

Handbook goals

In 2014, network businesses reached an agreement to: "Develop and publish a set of industry endorsed Customer Engagement Best Practice Guidelines for NSP businesses that provide best practice guidance to ENA member businesses for engaging with customers." This agreement reflects one of the network industry's responses to the Australian Energy Regulator's *Consumer Engagement Guideline for Network Service Providers* (released in November 2013).

Subsequent planning and discussion among network businesses has generated a more comprehensive set of goals for this handbook, which are:

1.	To provide best practice guidance to ENA member businesses for engaging with customers	The intention of this handbook is not to duplicate the AER engagement guideline, but to complement and build on it (and other guidelines) to inform the planning, execution, evaluation and continuous improvement of engagement activities undertaken by network businesses.
2.	To help network businesses build relationships with customers and consumer groups	The handbook will help network businesses to demonstrate meaningful engagement, provide transparency around engagement processes and goals, and address stakeholder expectations about engagement.
3.	To promote and enable the use of performance measurement and indicator tools in engagement activities	The handbook will identify meaningful performance measures, promote consistency in metrics used across businesses and activities, and thus allow businesses to track their engagement performance over time.
4.	To provide the opportunity for continuous learning and evolution of engagement activities	The handbook will provide a foundation for ongoing information sharing between network businesses and continuous improvement in their engagement activities.
5.	To leverage and expand the relationships between networks	The handbook will enable and encourage collaboration between network businesses to maximise efficiencies and effectiveness of their engagement.

It is expected that the handbook will be both a printed document that is released to stakeholders, and a web-based set of material (probably on the ENA website) that is updated over time.

Questions about the engagement handbook:
- What would make this engagement handbook useful for you?

- From your perspective, how will we know if this handbook is working?

Questions about engagement performance:
- What specific <u>types</u> of engagement do you think are particularly valuable?

- In terms of engagement, what do network businesses currently do <u>well?</u>

- What do they currently do <u>poorly</u>?

Handbook content

The handbook will have four sections:
1. Engagement principles
2. Engagement definitions
3. Specific engagement advice
4. Performance indicators and other metrics

1. Engagement Principles

The handbook will include a set of agreed principles about the **objectives** of engagement. These principals need to be sufficiently abstract to guide engagement without restricting the approaches of individual network businesses. There will be clear statements of why we are engaging, and what engagement is trying to achieve, and the handbook will link these principles back to the AER engagement guidelines.

There will be listed principals about **how** engagement should be approached, to address questions of:

- <u>who</u> should be engaged,
- <u>how much</u> and <u>how often</u> they should be engaged, and
- the <u>tailoring</u> of engagement across contexts and over time.

The handbook will list principals of how engagement should **integrate** with other areas:

- If engagement doesn't impact the rest of the business, then it is has no value.
- If engagement isn't reported to external stakeholders, then it is less effective.
- If engagement isn't shared between NSPs, it's a wasted learning opportunity.

Questions on engagement goals:
- What should network businesses be trying to <u>achieve</u> with engagement?

- What specific <u>issues</u> are most important for network businesses to engage on?

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2. Engagement Definitions

A range of content areas and terms will defined in the handbook to ensure consistency. These include:

Dimensions of engagement:	- IAP2 and AA1000SES guidelines - Internal versus sub-contracted - Ongoing versus one-off - Broad versus targeted - Personal versus printed versus web-based - Business-as-usual versus specific issue
<u>Types</u> of engagement method:	- Interviews - Focus groups - Community forums - Questionnaires - Willingness to pay / choice modelling studies - Web page material - Direct mailouts - Consumer panels/customer committees - Include information on criteria for usage (e.g. indicative benefits and costs)

Methods for <u>targeting</u> engagement activity:	- Approaches for identifying material issues for engagement (i.e. what areas/subjects are open to influence from customers) - What areas are too complex for initial engagement and how can they be broken down first to then allow engagement later? - How do we make bland areas interesting enough to keep people engaged? - Stakeholder mapping / other stakeholder assessment processes - Engaging other internal areas of the business on engagement

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Questions about customers/end users:
- How can we address peoples' low levels of concern and interest about network issues?

- How could we better co-ordinate multiple engagement efforts (by advocacy groups, networks, retailers, etc.)?

- Is segmentation of end-users important? Why/why not?

- What should be the balance between network businesses engagement with customer groups directly versus engagement with advocates of those groups?

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3. Specific engagement advice

The handbook will provide specific guidance on what engagement methods are most appropriate and preferred for different situations, contexts, and/or topics. It will provide a table or flowchart of "preferred" engagement approaches for different needs. Rather than reproducing the extensive material already available, the handbook will cite other resources for further information on specific methods.

The handbook will provide some detail about each main method of engagement. It will:

- Identify the main points but avoid extensive detail
- Provide links to useful external reference sources (ideally online)
- Provide a positive case study example for each engagement method
- List potential pitfalls and complicating factors for each method.

The handbook will discuss details of how engagement outputs should be shared. It will consider ways to share outcomes with stakeholders, methods to demonstrate that engagement has impacted business decisions, and ways to share information within and between network businesses (e.g. fact sheets, topics of consumer interest, good and bad experiences).

Likely external sources to be referenced in the handbook include:

- AER guidelines on engagement
- Australian standards for engagement (AA1000SES)
- IAP2 spectrum of engagement types
- Other engagement sites and useful websites

Questions on resource documents:
- Can you give us <u>examples</u> of best practice engagement (from this or other sectors)?

- Can you give us examples of research or reports <u>about</u> engagement that you have found particularly useful/influential?

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4. Performance indicators and other metrics

The handbook will provide specific detail guidance on the selection, measurement and tracking of indicators/metrics of engagement activities.

General guidelines for all indicators:	- Specific - Measureable - Agreed (also achievable or actionable) - Relevant - Time-oriented
All engagement/ business as usual measures:	- Brand health/reputation measures, media reporting - Number of complaints, complaints as a percentage of contacts - Number of engagement events, scale of engagement events - The identification of what <u>changes the business made</u> as a consequence of the engagement - Measures of the quality of engagement <u>processes</u> - Measures of the engagement <u>outcomes</u> against published engagement principles and corporate values - Annual stakeholder/customer survey – overall satisfaction scores
Web-based information and engagement:	- Digital metrics: traffic/likes/reach - Social media sentiment - Involvement in webinars - Polls following webinars

Face-to-face engagement activities:	- Attendance/repeat attendance - Qualitative interviews - Feedback sheets - Informal feedback after engagement processes - Formal feedback processes after engagement processes
Engagement on specific initiatives:	- Endorsement by stakeholders - Outcomes of the engagement process/initiative
Contact with the Australian Energy Regulator:	- Submissions by stakeholders about the network business to the AER - Feedback to the network business from the AER
Specific questions for formal engagement feedback:	- Were you satisfied with the engagement process? - Did we value your engagement and interest? - Did we help you to engage in meaningful way? - Did you have the capacity to engage? - Was our process open and transparent? - Did we clearly define your opportunity for input? - Did our timing allow your input? - Were appropriate people engaged? - Do you support the outcome of the engagement process?

Questions about performance measures:
- Do you have suggestions for specific performance indicators we could use?

- Do you have any concerns about how performance indicators might be used or reported?

Questions about the role of advocacy groups and other stakeholders:
- What changes would help you to better engage with network businesses?

- What could we do to better co-ordinate engagement across multiple stakeholders, between national and state bodies, etc.?