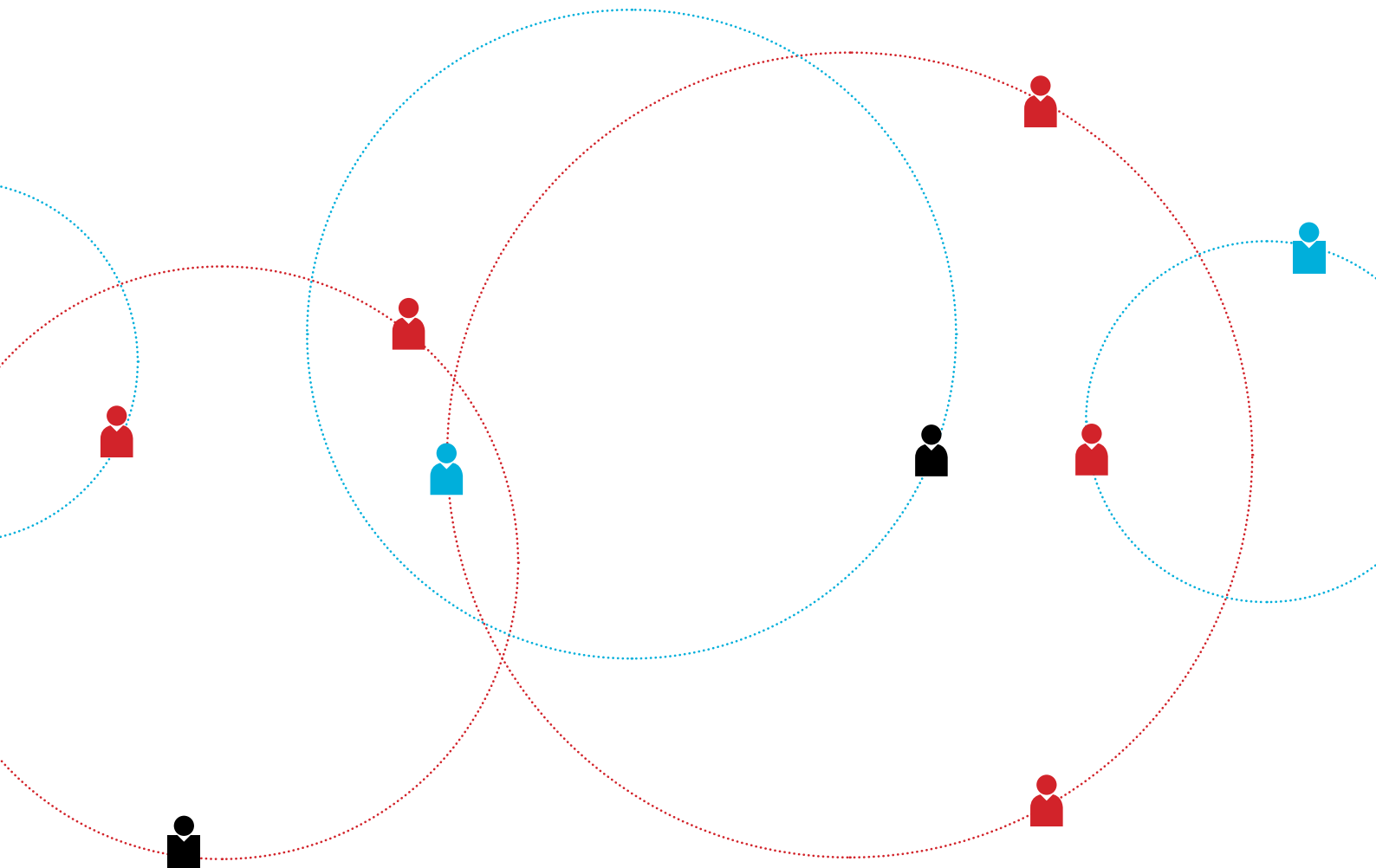


CUSTOMER ENGAGEMENT HANDBOOK

July 2016



ELECTRICITY NETWORK
TRANSFORMATION ROADMAP



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EXECUTIVE SUMMARY

Energy systems around the world – and especially in Australia – are experiencing change on an unprecedented scale. This remarkable transformation reflects a change in traditional customer aspirations and customers now possess new levels of empowerment and engagement.

Until recently, almost all electricity in Australia was provided by a small number of generation plants and flowed in a single direction to consumers who used energy in largely the same way. Today, Australia has the highest global penetration rates of rooftop solar photovoltaic (solar PV) systems. Our nation is seen as a global ‘test bed’ for energy storage market entrants because we have a wide range of customers who are increasingly diverse in their energy use and level of engagement with the energy industry.

As this change takes place, timely access to safe and reliable energy services and more affordable prices remain fundamental to modern life in Australia. Energy is critical to our future economic growth and employment, enabling almost every aspect of our modern lifestyle.

In this environment, energy network businesses are re-establishing their commitment to understanding and meeting the needs of their customers. Network businesses are committed to supporting customers’ aspirations and engagement with new and emerging technologies. As an industry, we aspire to create customer centric businesses, built on relationships of mutual trust and respect. Genuine and transparent dialogue will create new values, build trust, and develop the foundations of a sustainable and resilient energy system.

This Customer Engagement Handbook has been designed to provide practical, industry-endorsed guidance that supports energy network businesses to foster transparent dialogue with their customers. Developed with input from consumer representatives and CSIRO social science experts, the Customer Engagement Handbook goals are to:

- » **Provide guidance to ENA member businesses for customer engagement** – The Handbook challenges network businesses to give the highest priority to customer engagement. It aims to equip them with practical advice in a manner that is tailored for issues and challenges relevant to the energy sector.

- » **Provide the opportunity for continuous learning and evolution of engagement activities** – The Handbook provides a foundation for ongoing information sharing between customers and network businesses and for continuous improvement in their engagement activities. It is recognised that engagement practice and expertise will evolve over time, and that ongoing work should take place on strengthening engagement practice beyond the publication of this Handbook.
- » **Strengthen relationships between energy networks, customers and consumer groups** – The Handbook is designed to support network businesses’ engagement activities, provide transparency around engagement processes and goals, and address customer and stakeholder expectations about engagement.
- » **Support the use of performance measurement and indicator tools in engagement activities** – The Handbook identifies meaningful performance measures, aims to promote consistency in metrics used across network businesses and activities, and is designed to assist in tracking their engagement performance over time.
- » **Leverage opportunities for networks to collaborate on customer engagement** – The Handbook is designed to enable and encourage collaboration between network businesses and their customers to maximise efficiencies and effectiveness of their shared engagement activities.

This Handbook is intended to build on the considerable work that electricity and gas transmission and distribution network service providers have already undertaken to develop consumer engagement strategies and implement engagement programs with customers.

It does not duplicate the Australian Energy Regulator’s (AER) Consumer Engagement Guideline for Network Service Providers, but is intended to complement and build on it (and other guidelines) to help network businesses plan, execute, evaluate and continuously improve their engagement activities.

The Handbook is divided into five main sections:

1. Engagement environment

This section describes the environment in which network businesses operate. This has implications for how and on what topics they engage with stakeholders. Background is provided about the diversity of energy customers and their changing needs and aspirations. The importance of business culture in driving effective customer engagement, and the support and direction required from senior leaders within energy network businesses are highlighted.

2. Implementing effective engagement

This section introduces important concepts associated with engagement. To avoid duplicating or overwriting the existing regulator guidelines or network businesses' own engagement strategies, this section focusses on the broad elements that are related to effectiveness of engagement. These elements include building mutual trust, purpose and planning, achieving a true dialogue, creating an explicit two-way flow of information and learning, recognising a scale of participation, and responsible and ethical conduct.

3. Methods for engagement

This section describes some (but by no means all) of the major methods of engagement, split into the three broad goals of *provide information*, *consult and involve*, and *collaborate and empower*. Examples, tips, advantages and disadvantages are described, and additional resources for more detailed treatments of engagement methods are provided.

4. Sharing engagement outputs

This section provides specific discussion about the processes and value of *sharing engagement outputs* with engagement participants, and with a wide array of other stakeholders.

5. Evaluating engagement

This section provides detailed discussion of the methods used to evaluate consumer engagement. Key performance indicators for engagement are discussed and described. More specifically, individual metrics of engagement are discussed, along with details of how to develop high quality metrics, and some examples are given of potential engagement metrics that could be adopted by network businesses.

Throughout the Handbook, there are references and web links to further resources on specific topics and case studies of engagement drawn from Australian energy network businesses. The case studies are presented without naming the specific network business, but they include sufficient detail that the source could easily be identified. The objective of the case studies is to focus on the range of engagement activities and approaches that have been used, rather than to draw attention to individual businesses.

Development of the Customer Engagement Handbook

In developing this Handbook, formal engagement via workshops and direct conversations took place between the CSIRO, customer engagement practitioners from energy network businesses, and external stakeholders of the network businesses, including representatives from an array of consumer advocacy and other stakeholder groups.

Participants in these workshops provided detailed advice about how customer engagement conducted by network businesses could be improved, and what specific content should be included in the Handbook.

The ENA and the CSIRO recognise that engagement practice and expertise will evolve over time, and that this Handbook should be viewed as the beginning of a process, not the end. Further work on content may be incorporated into subsequent editions of this Handbook and there is important ongoing work that should take place between all participants in the energy system to share experience and expertise.

A supporting *Handbook Feedback* document has been circulated with the Handbook. This document outlines all feedback provided throughout the development of the Handbook, together with changes that have been made within the final Handbook to address this feedback.

Potential opportunities to progress engagement practices across the industry have also been identified and circulated in a complementary document, *Sharing Customer Engagement Practice*. This document will be used in ongoing discussions to advance improved engagement and measurement practices with a range of industry stakeholders.

1. ENGAGEMENT ENVIRONMENT

Customers are driving the transformation of global energy systems empowered by an increasing range of ‘new energy’ technologies and services. CSIRO analysis undertaken as part of the *Electricity Network Transformation Roadmap Interim Program Report* demonstrates that over \$224 billion – or more than a quarter – of all electricity system investment to 2050, may be made directly by Australian electricity customers (i.e. investment in new household energy technologies such as solar panels, battery storage technologies, inverters and home energy management systems etc.). Decision making power is moving to energy customers. This requires a commitment by the energy network industry to understand and serve their diverse needs and aspirations.

With rapid changes across the system and the evolving relationship between customers and energy services, direct engagement with customers is more important than ever. Dialogue is key to developing genuine customer-orientation, fostering trust and creating new value for customers and this dialogue will play a critical role in assuring the sustainability of an energy system that delivers value and is accessible to customers of all types.

While the need to engage is increasingly important, there are also advanced methods, tools and resources available for energy network business to engage directly with their customers in an effective and transparent way.

The importance of engagement, combined with the advances in engagement practice, both in technology and expertise, provides a clear opportunity to better understand the priorities of Australian energy customers.

Energy network businesses provide, among other things, monopoly services which are regulated by the AER. As part of their five-yearly assessment of energy network businesses’ revenue proposals, the AER considers (among other factors) the extent and quality of ‘**consumer engagement undertaken**’ (described in Appendix A). It is important to note, however, that energy network businesses agree that for engagement to be effective, it cannot merely be a compliance exercise.

Effective customer engagement improves business practice and results in better outcomes for both the customers and network businesses.

Fundamentally, **network businesses conduct engagement because it delivers better outcomes for customers and supports the success of the business.**

Energy networks serve millions of very diverse customers. This diversity together with the inherent complexity of modern energy and regulatory systems plus the fast evolving needs of energy customers present significant challenges.

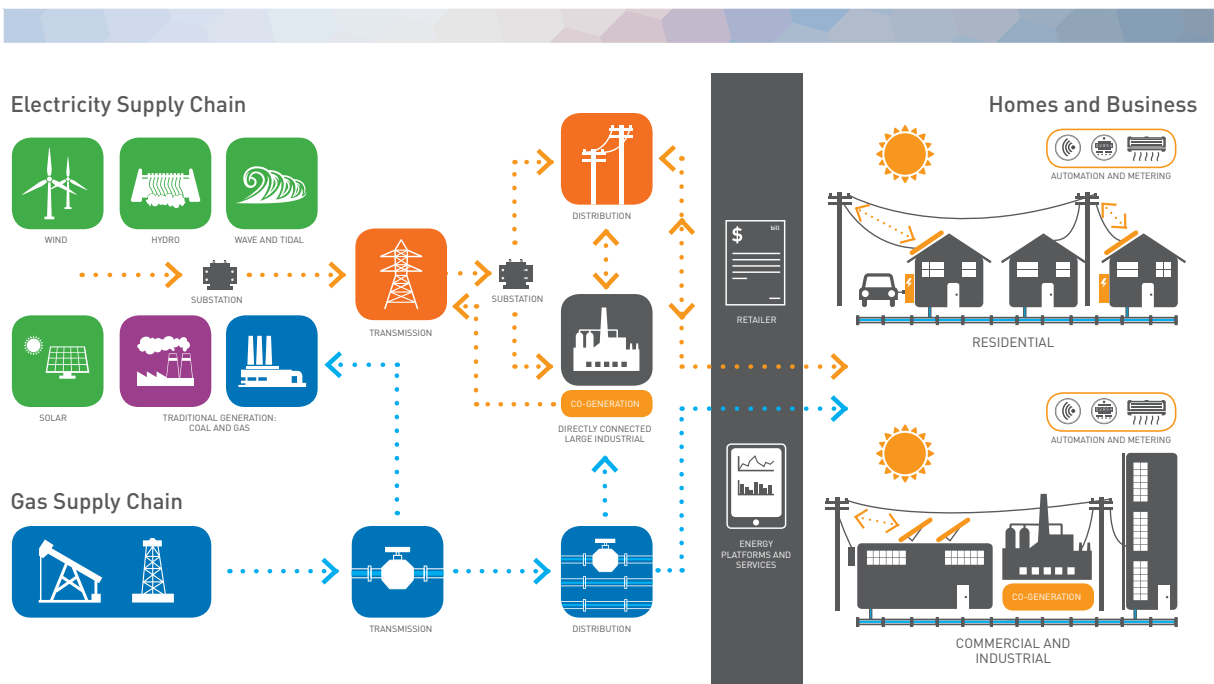
The engagement landscape includes multiple stakeholders, including individual residential, commercial and industrial customers, consumer advocacy and other stakeholder groups, energy retailers (as the main customer interface for the sector), ‘new energy’ providers, institutional parties, such as the AER, including its Consumer Challenge Panel, the Australian Energy Market Commission (AEMC), the Australian Energy Market Operator (AEMO), and other generation, transmission and distribution businesses.

Governments at both the federal and state levels play a critical role in the energy system, including setting policy direction and reforms to address customer value from energy services. Governments at all levels play a critical role in customer engagement with network businesses.

Figure 1 indicates the range of market actors and energy customers that are participating in the energy system now.

It is important to recognise that energy customers will have direct relationships with intermediaries, such as retailers, and increasingly with third party service providers. Network distributors themselves act as intermediaries between transmission businesses and consumers further downstream in the energy supply chain. Thus all system elements should be considered as part of the customer engagement environment to ensure the industry as a whole enables customer value.

Figure 1: Energy system participants and customers



Energy networks have a clear customer service obligation, and will be active in the community on a day-to-day basis through the operation and maintenance of critical infrastructure and customer connections. Energy retailers share this relationship with customers as key participants in the electricity system, providing a direct interface with customers, with responsibility for energy billing. As a result, effective customer engagement activities will often seek critical input and participation from retailers.

Increasingly, new third party service providers will also play an important role in the relationship and ongoing engagement with energy customers. From the installation and maintenance of embedded generation, like residential solar, to new systems of home automation and demand management, customer engagement will need to be a collaborative, rather than competitive, effort on the part of all service providers.

The challenge and opportunity of customer engagement

A number of features that influence effective engagement with energy customers are worthy of note:

Firstly, the relative contribution of energy costs to the overall budget of a household or the running costs of a business can vary dramatically, from a very minor component through to a primary concern. For some customers this means that energy is front of mind while for others it is rarely considered.

Secondly, feedback about energy use is typically provided only infrequently and with little detail (for example via quarterly bills), but some customers have access to, and more interest in, detailed and precise information about their energy use and its associated costs.

Thirdly, there is diversity in market structures and energy access across different geographical regions in Australia. Potential engagement topics of concern to stakeholders in one location may differ from topics of interest in another.

Finally, it is important to recognise that total customer energy consumption, and patterns of consumption over time, may not be easily or immediately changed. This is because the number and type of installed appliances, and the habitual usage patterns of individual customers, households and businesses, are together a much stronger driver of their energy consumption than are deliberate choices to “consume energy”. Therefore, the relatively infrequent decisions households or businesses make when purchasing or replacing appliances often have much larger consequences for their energy consumption than the day-to-day decisions they make when turning appliances on or off.

This complexity and diversity is why the pursuit of customer engagement excellence is so important for energy network businesses. While it may be challenging, it is simply not sustainable for network businesses to assume they understand the priorities and needs of so many different types of customers and stakeholders. This means that the only viable alternative is to systematically pursue comprehensive and ongoing customer engagement.

Exploring customer diversity

In the context of energy system transformation, new value is increasingly tailored around the expectations of particular customer types. However, energy customers have traditionally been considered in the following very broad categories:

- » Residential customers
- » Small to medium enterprises (SMEs)
- » Commercial and industrial customers (C&I).

This historic approach to categorising customers is recognised as being an inadequate basis for understanding them now and in the future. As a result, it is necessary to expand the definition of network customers to include:

- » Traditional end-user customers (residential, commercial and industrial) who primarily receive energy from network businesses.
- » End-user ‘prosumers’ who both consume and supply energy services (some of whom may disconnect from the network periodically or permanently).
- » New and existing service providers and other market participants who function as a ‘value network’, collaborating and/or competing with network businesses to provide diverse energy and other solutions to customers.

These customer groupings need to be added to engagement activities as they emerge across the energy marketplace.

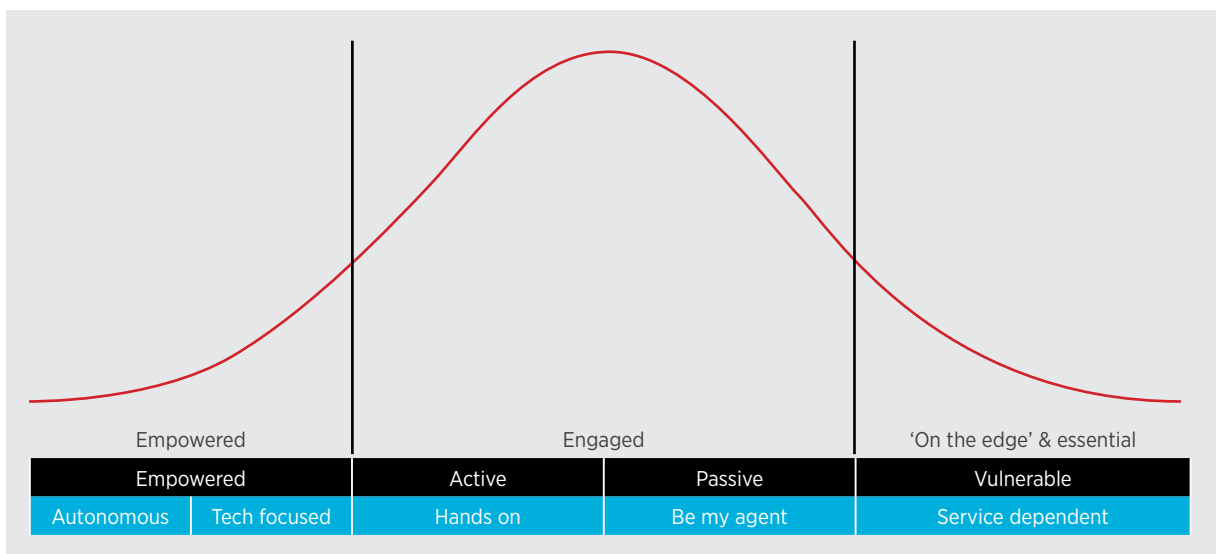


The *Electricity Network Transformation Roadmap Interim Project Report* provides a detailed analysis of plausible future energy customer types across a broad spectrum of market segments for residential and non-residential customers. This is illustrated in Figures 2 and 3 below.

In the case of future residential customers, the *Interim Project Report* proposes that some will be highly dependent on the electricity grid to maintain their standard of living (at the far right of figure 2).

By contrast, other customers will be highly autonomous and some may leave the grid altogether (at the far left of figure 2). The bulk of future customers are likely to be either actively or passively engaged (centre right or left of the spectrum). The actual proportions of customers in each segment will also likely shift over time as customers respond to emerging market and technology trends, further underscoring the importance of ongoing customer engagement.

Figure 2: Proposed market segmentation curve for residential customers



Source: Plausible 2025 customer segments were informed by an international literature review, commissioned expert papers and structured stakeholder workshops. In particular, Rosemary Sinclair of Energy Consumers Australia is acknowledged for employing the market curve device to graphically represent customer segments (adapted with permission).

Figure 3: Proposed market segmentation curve for non-residential end customers



Source: Plausible 2025 customer segments were informed by an international literature review, commissioned expert papers and structured stakeholder workshops. In particular, Rosemary Sinclair of Energy Consumers Australia is acknowledged for employing the market curve device to graphically represent customer segments (adapted with permission).

For non-residential customers, the *Interim Project Report* identified four non-residential customer segments (see Figure 3). It suggests that it is also plausible to consider future non-residential customers across an ‘essential–engaged–empowered’ spectrum, similar to that of residential customers. The following two factors will be particularly relevant in segmenting non-residential customers in the future:

- 1. Focus on energy** – A measure of how much focus an organisation places on energy costs and/or technologies.
- 2. Ability to act** – A combined measure of how motivated and capable an organisation is to change the way it interacts with energy to achieve desired outcomes.

It is important to recognise that across both categories, these customers:

- » Will have different combinations of objectives and priorities that they will want energy services to support.
- » Will have different levels of willingness and ability to engage with technical complexity and/or assume some responsibility for their energy supply in exchange for a financial benefit, or personal value.
- » Are likely to have a declining correlation with household or enterprise financial status as new business models and financing solutions evolve.
- » Will not be static, as households and enterprises likely transition between segments at different stages of their life cycle, either in the direction of greater autonomy or of increased dependence.

Engagement must be championed by energy network decision makers

As noted earlier, this Handbook was born out of recognition that the energy sector is undergoing a profound, customer-driven transformation, and that this requires a sincere and transparent approach to create a dialogue with energy customers so that the system can deliver the services they value.

Considerable work has already taken place with electricity and gas transmission and distribution businesses to develop consumer engagement strategies and implement engagement programs with customers. This includes developing capacity within their organisations, with customer advocate organisations and within the communities they represent.

Effective engagement must be supported by a culture across the organisation focused on delivering effective customer outcomes and seeking customer guidance and input frequently. It is agreed that effective customer engagement must be supported by a coordinated and top-down organisational focus on customers, and that forging an ‘engagement culture’ must ultimately be championed and resourced by network businesses’ senior decision makers.

CASE STUDY 1

The development of the Tariff Structure Statement required distributors to engage with customers and to consider customer impacts. These obligations were aligned with Distributor X's core values and provided an opportunity to test engagement practices within a meaningful program.

Throughout the development phase of tariffs up to 2020, Distributor X worked to create open, transparent and meaningful relationships with customers, representative groups and other stakeholders, such as retailers and government, as part of the tariff reform program.

Initially, the engagement process was documented in a detailed engagement plan with key activities aligned to relevant International Association of Public Participation (IAP2) levels of engagement. Various stages of engagement were outlined in the plan and the plan was approved by the relevant internal subject matter experts to gain internal buy-in and provide subject matter oversight.

Stage one aimed to deliver a program that met the 'inform' and 'consult' levels of the IAP2 framework through the publication of a discussion paper and the hosting of a four customer workshops.

The discussion paper provided information on demand based tariffs to prepare customers for the workshops. The workshops were open to all customers. Their aim was to gain customer feedback on the tariff principles and achieve customer consensus on the proposed design.

At the second workshop the engagement process struggled as competing stakeholder interests surfaced, causing some participants to express disengagement in the process and as a result outcomes weren't met.

From this experience it became apparent that not all participants were of the same understanding of the need for tariff reform. This suggested that the process had moved too quickly into the 'consult' step within the IAP2 framework and insufficient time had been spent explaining a complex concept. The structured approach of the workshops also limited the subject matter experts' options which led to internal expectations not being met.

It was apparent that:

- » Engagement wasn't effectively addressing customers' needs, concerns or expectations, even though it aligned to the IAP2 framework.
- » The feedback collected through the engagement wasn't meeting the needs or expectations of internal subject matter experts.
- » The goal of customer consensus was unrealistic and wasn't best practice engagement.
- » Running 'all-in' workshops might be easier from an organising perspective as it is less resource intensive, but it wasn't providing an opportunity for divergent views to be appropriately discussed and considered. Therefore, it wasn't appropriate to have all customer types and stakeholders in the same workshop.
- » The majority of time at workshops was spent informing customers with little time devoted to consulting or collaborating with customers.

From a customer perspective, feedback was received that:

- » The workshops wasted customers' time.
- » The interests of different stakeholders weren't being discussed and there was a perception that 'whoever shouts the loudest wins'.
- » There were concerns that the decision to use demand tariffs was not clearly explained and that any attempt to discuss the design of the tariffs was an attempt to cover up the decision.
- » Transparency was becoming an issue as there wasn't trust between stakeholders and Distributor X.

Prior to workshop three, out of session engagement occurred. Key stakeholders were approached and the issues from the previous workshops were raised. This provided stakeholders with an opportunity to provide frank feedback on the engagement process outside of the workshop environment and a commitment was given that the feedback would be used to design the remaining workshops.

From this feedback it was decided that workshop three would be spent providing the necessary background information for tariff decisions and a comprehensive yet simple education program on demand tariffs and existing tariffs. Participants

were strongly encouraged to attend the remaining two workshops for continuity. The aims of the workshop were communicated to all who had participated in previous workshops so that there were realistic expectations of what the workshop would deliver.

Following workshop three, participants were contacted to discuss the outcomes of the workshop and whether they felt concerns regarding the engagement process were being addressed. In these informal discussions participants expressed more confidence in the process and an eagerness to continue engaging with Distributor X.

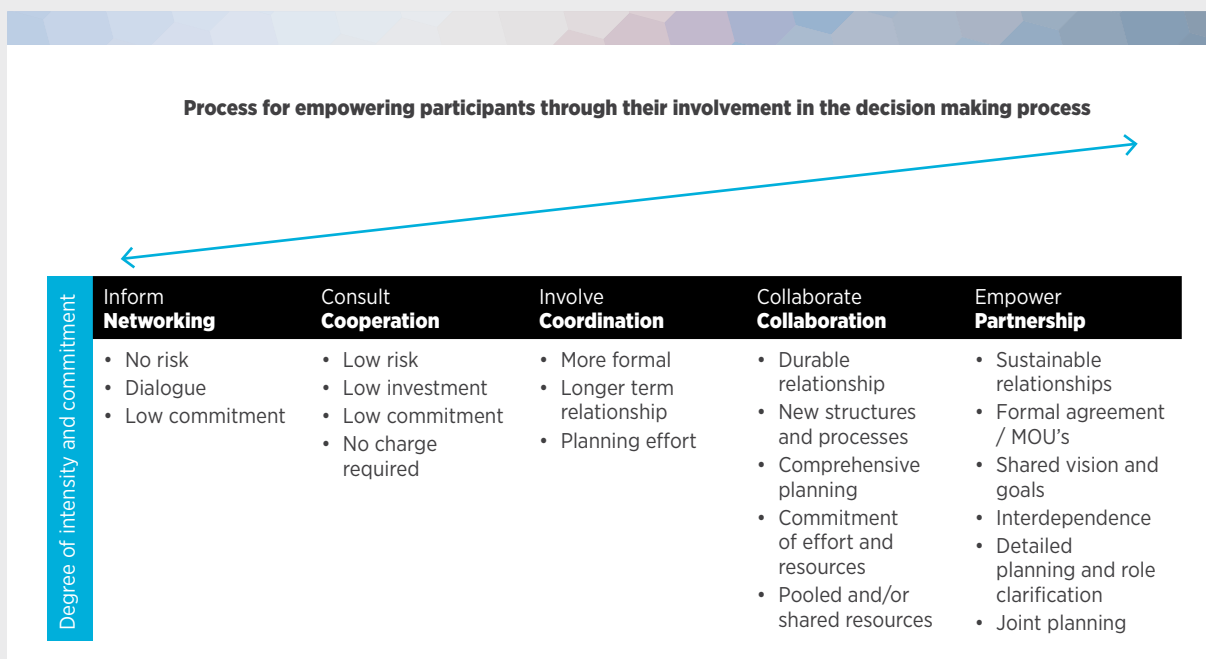
To meet stakeholder expectations around collaboration, workshop four introduced the concept of customer co-design. The facilitation style was changed from previous workshops to a style that promoted collaboration and supported creativity among participants. This resulted in quality customer and stakeholder input into the design of the residential and small business demand tariffs and demonstrated our commitment to working with customers and stakeholders to deliver reform.

Key engagement lessons

Many customers and stakeholders felt that the individual needs of their constituents or groups weren't able to be addressed using what was perceived to be a 'one size fits all' approach to engagement. Internally it was felt that the IAP2 framework, while a good guide to engagement, did limit the adaptability and responsiveness of engagement approaches. Subject matter experts wanted to consider the results of customer engagement processes but the initial approach did not provide quality feedback and left subject matter experts with little useable information to consider.

Using the IAP2 public participation spectrum and the AER's Consumer Engagement Guideline for Network Service Providers as a framework/guide, the engagement practice was modified to a more tailored approach to engagement that emphasised partnerships. To support the establishment and furthering of productive partnerships the Victorian Health Partnership Model Partnership Practice Guide from the Victorian Council of Social Service was combined with the IAP2 framework. This allowed flexibility in approach rather than adherence at any given point in time to the discrete steps within the IAP2 framework.

Figure 4: Continuum of Joint Effort¹ and the IAP2 Spectrum



¹ Partnership Practice Guide, Victorian Council of Social Service, available at: <http://vcoss.org.au/strong-sector/partnerships-decd/>

Another limitation of the initial process was the ability to reach all customers. For previous engagement processes, surveys were used to reach the mass market of residential and business customers and insights were used to inform key decisions. Feedback was received from customer advocacy groups that surveys were being relied on too heavily for engagement and that good practice engagement required distributors to work more with advocacy groups and to rely on advocate networks for broader engagement.

Considerable time was spent analysing the results of the workshops and the feedback on tariffs received as part of the process to redesign the tariffs. The Customer Engagement Team focused on understanding what worked and what didn't work from stage one to ensure improvement in engagement practice.

Tailored engagement

Ongoing engagement focused on understanding and meeting the needs and expectations of stakeholders. One-on-one meetings with customer advocacy groups were organised, with the engagement team calling a few days ahead to clarify the purpose of the meeting and to ascertain if any specific information was required. This meant that subject matter experts were able to tailor the information to the needs of the stakeholders, leading to informed discussions. There were other key elements of this engagement that enabled a tailored approach:

- » Meetings were offered at the stakeholders' location.
- » Subject matter experts were included in the meetings to hear and discuss first-hand the issues raised.
- » Presentations were provided before meetings wherever possible.
- » Meetings were followed up with phone calls and emails to ascertain if further information/clarification was required.

These meetings provided stakeholders with opportunities to ask questions specific to their representative group and constituents, and also allowed the testing of ideas with specific groups before broadly consulting on those ideas.

Results from engagement process

The changes to the engagement process resulted in widespread understanding among customer advocacy groups of why tariff reform was required, support for the majority of tariff elements and a mutual acceptance that there was agreement to disagree.

The benefits for the internal subject matter experts were:

- » The development of tariffs that addressed the needs of customers.
- » Greater understanding of the remaining concerns of customer advocacy groups.
- » Confidence from key decision makers and regulators that tariff decisions had been informed by customers.
- » A better product that considered market factors not just tariffs.

A clear benefit for the organisation was the establishment of relationships with customer groups based on trust which benefitted both Distributor X and the customer groups. These relationships have continued beyond the tariff development program and are being utilised to develop joint work in community benefit programs for vulnerable customers and to devise strategic initiatives. It's hoped that by continuing to approach engagement within the modified framework of IAP2 and the continuum of joint effort that these relationships will continue to grow and deliver beneficial outcomes for customers into the future.

2. IMPLEMENTING CUSTOMER ENGAGEMENT

Customer engagement follows similar processes to stakeholder or community engagement practiced by government and community organisations. However, customer engagement is generally undertaken by a business, such as a network service provider, for the purposes of understanding customer and community preferences and aligning their business activities to them.

Within the Australian energy context, customer engagement can act as a proxy for a competitive market, in order to reflect the preferences of customers in the commercial decisions of regulated natural monopoly businesses, or to build on an understanding of service preferences where there is less regulation.

One useful set of principles for engagement in the electricity utility domain has been published by the World Business Council on Sustainable Development. They outline five principles that they argue are key for meaningful and successful engagement with electricity stakeholders:

- » **Transparency:** clear and comprehensive disclosure of information about company decisions that impact stakeholders and the public.
- » **Responsiveness:** respect for stakeholder views and acceptance of appropriate scrutiny and the duty to respond to it.
- » **Inclusiveness:** the will to engage, both with the general public and with affected and interested groups.
- » **Materiality:** assess and prioritise the importance of issues that can influence a company's decisions and those of its stakeholders.
- » **Measurement:** documenting the engagement process, its output and assessment.

Other guiding principles in the context of engagement have been identified (e.g. the AER guidelines cited earlier in this Handbook), and network businesses have already identified their own principles for their work in this area.

Rather than try to contrast these approaches, or combine them into a single set of principles, this Handbook describes the **common features that have been linked to effective customer engagement.**

Effective customer engagement is a dialogue

As a dialogue, engagement needs to explicitly consider a two-way flow of information and learning. Good engagement is a mechanism that provides new information to both the energy business and the people with whom it engages.

For the network business, a key aim of engagement is to help them to understand customers' points of view, attitudes, preferences and concerns. It is vital that network businesses do not presume to know what their customers know, prefer or consider important – these factors will change over time. The diversity of knowledge among different groups of stakeholders means that energy businesses should be continually checking and updating their understanding of their customers' concerns.

In turn, engagement provides an opportunity for customers and other stakeholders to learn more about the energy sector and the concerns of the network business which:

- » Ensures that a minimum level of knowledge about the network business or specific engagement topic is held by all participants. This process provides context, which is required for people to understand why and how their contribution impacts the network business.
- » Expands the current pool of stakeholders who have the capacity to provide an informed view on specific engagement issues. With a larger and more diverse pool of stakeholders, the network business can more easily conduct subsequent engagement which is both representative and effective.

Engagement does not always require agreement, nor should agreement be treated as an indicator of engagement success. Like any dialogue between parties with different concerns and goals, there are multiple possible outcomes – a compromise may be found, more work to identify new options might be required, or the parties might agree to disagree.

Engagement isn't ever "finished". Once a relationship is established, the engagement dialogue will wax and wane over time in response to changing needs and concerns of all

participants; some people will withdraw, other new stakeholders will become involved, depending on the issue. However, the fundamental principles of engagement, particularly the drivers for network businesses to pursue engagement, are likely to remain in place well into the foreseeable future.

Engagement isn't ever "perfect". Although a specific engagement process might have many features that are considered "best practice", there is no such thing as completely flawless engagement; this is just as impossible as a "perfect conversation". Remembering that engagement is an ongoing dialogue helps to emphasise that all processes can be improved, and all outcomes (both positive and negative) have a role to play in improving subsequent efforts.

Best practice engagement involves the interplay between three elements: capacity building, relationship development, and decision making. The degree to which each of these is addressed by any specific process will likely differ, but over time, all elements will be incorporated. Importantly, all of these elements apply to all participants: networks businesses, their customers and other stakeholders.

Effective customer engagement aims to build mutual trust

The purpose of effective engagement is to develop a mutually beneficial working relationship between an energy network business and its customers. It is not only about developing satisfied customers, but also about fostering the community's trust in the decisions of the business and sense of legitimacy in the business more broadly.

Genuine, responsive dialogue between network businesses and energy customers is key to establishing trust between the parties. Further important benefits from such engagement include:

- ✓ Energy network businesses better comprehend the diversity of customer priorities, which provides information on the likely demand for existing services and enhances the ability to create new services.
- ✓ It allows customers to understand and confidently offer their views to an energy network business.

- ✓ It is an important factor in the regulatory determination process when network businesses submit their revenue proposals for the forthcoming five-year period, and in other formal regulatory and rule making processes.

An effective customer engagement process is a vital component of an energy network business' relationship with its customers, its reputation, the ease with which it operates in a community and, overall, the confidence the community can have in network decision making processes.

Best practice engagement involves senior management, the CEO and ideally the Board as core sponsors of the engagement process. Such involvement signals the importance that the business places on engagement, and demonstrates that engagement is integral to the business' strategy and operations, rather than "bolted on". Relatedly, engagement efforts must be sufficiently resourced.

Effective customer engagement is strategic and planned

To be effective, customer engagement must be treated as vital to the broader strategy and ongoing operations of an energy network business. At times it may be conducted 'outside the plan' due to certain circumstances but it is not primarily conducted in an ad hoc or reactive manner.

There is no single best way to undertake customer engagement, and effective engagement must be tailored to the specific needs and characteristics of the energy network business, their customer base (which is often comprised of different customer segments) and the local, environmental, and regional issues facing them.

Businesses need to develop their own customer engagement strategy that sets clear goals for the overall engagement process; identifies specific, preferred engagement methods and techniques for achieving these goals; and, importantly, defines ways of evaluating the success of achieving these goals and identifying potential opportunities for improving engagement strategies.

Each specific engagement activity should also have a more fine-grained engagement plan, which should include:

- ✓ **Clear links to the energy network business's broader strategic and/or operation objectives** (both long- and short-term) which require customer engagement for success. This is the overriding purpose of the engagement.
- ✓ **Goals for the engagement.** These are the specific, desired outcome from the engagement. They might include the degree of participation desired (e.g. information, consultation, collaboration, empowerment), or the desired result of engagement (e.g. increased awareness of energy supply issues, incorporation of community concerns into planning, etc.).
- ✓ **A clear scope for the engagement:**
 - **What is it about?** – Are you engaging on governance, policies, strategies, practices and/or performance?
 - **Who is involved?** – What type of customer is being targeted? Does it apply to a defined geographical area? A customer engagement plan would benefit from mapping key stakeholder and customer groups of the energy network business for engagement (all customers generally or segments of customers, e.g. solar customers, urban or rural customers).
 - **Time frames** – The success of some activities, especially those requiring deeper engagement, might depend on the performance and/or success of prior activities.
- ✓ **Transparency around the negotiable elements.** What is the business' capacity to respond to engagement outcomes? Specifying what the business is able to adjust, and what the business is not able to adjust, is important for both internal and external stakeholders' understanding of where and to what extent engagement can influence the business.
- ✓ **Methods and timing of engagement** For example, market research, communication material, community consultation.
- ✓ **Clear responsibility** for conducting engagement activities (which parts are conducted by internal staff and which parts are outsourced).

- ✓ **Strategies for evaluating the success of engagement,** namely the **key performance indicators and metrics** that will be used to evaluate the engagement activity and its outcomes.
- ✓ **Consideration of the risks of engaging** (and of not engaging), and formalised risk mitigation strategies.
- ✓ **Strategies for sharing the outcomes of the engagement** with those who participated, all customers, company staff, and perhaps other companies.
- ✓ **Provisions for the review and refinement of the larger customer engagement strategy** – the strategy should be subject to regular review and improvements where appropriate.

In **best practice engagement**, the engagement strategy itself will be generated in consultation with stakeholders, to ensure that stakeholder concerns, interests and values are embedded in it and in all subsequent engagement processes that it informs.

Planning Engagement

Some specific features of engagement planning that can help promote better outcomes include:

- » Start planning earlier so that engagement isn't rushed, and there is enough time to meet internal and external deadlines. A forward plan is also important to maximise participation by allowing for more effective recruitment.
- » Combine engagement efforts with other groups who are attempting to engage the same customers and/or advocates. For example, combining engagement processes with energy retailers and local councils can save time and produce better outcomes. Note that the extra coordination required here can add substantial logistical complexity to this approach.
- » Consider starting engagement efforts from within existing community groups. It can be time consuming to identify and recruit individuals for engagement from scratch. In some situations it may be possible to identify an existing group within the community to use as a springboard into a larger engagement process. This approach also allows for and advances shared learning among those conducting engagement.

- » Engage directly with other relevant businesses (within the energy domain, other utilities) to both learn from their engagement efforts, and to help generate consistent language and expectations across different businesses' engagement efforts.
- » Recognise that different engagement goals will progress over different time periods, and with different frequency of contact. Some engagement can be successful with only a few brief periods of contact in a narrow period of time. Other engagement may require longer contact, and/or more repeated contact, in order to generate the shared understanding required to find a solution to a particularly complex issue. In such cases, very infrequent engagement is counter-productive; long delays between contacts will reduce momentum, and will provoke inefficient repetition to ensure everyone is up to speed with the issues involved.
- » Make efforts to ensure that the stakeholders who are engaged are representative of the entire community, including the elderly, younger customers, indigenous groups, low income customers, people from culturally and linguistically diverse backgrounds, rural customers, people with a disability, and so on. Specialist assistance and/or additional resourcing might be required to help design recruitment and engagement methods that suit these diverse groups because of language or accessibility issues, and/or where sourcing representatives from some cohorts is particularly difficult.
- » Accept that some people being engaged will have strong views. Acknowledging these and giving time and attention to their concerns is as much a part of representative engagement as is involving people with different backgrounds or usage patterns.
- » Consider whether other specific types of customers need to be deliberately engaged, for example: large customers, renters versus owners, customers of exempt/embedded networks, community organisations, solar PV customers, single- versus dual-income households, new customers, local councils, and early adopters of emerging technology. Some of these groups will have formal representatives that can be identified and engaged, while other groups will be better accessed through targeted recruitment for specific engagement activities.
- » Accept that different types of customers and other stakeholders will prefer (or indeed require) different types of engagement processes.

Best practice engagement is planned with reference to an overall organisational strategy, informed by clearly articulated engagement principles, and repeatedly adjusted and updated as individual processes are conducted, more is learned, and the context changes over time. Similarly, best practice engagement itself clearly and directly influences decisions made in the broader organisation.

Identifying Stakeholders for Engagement

As noted earlier, there is a large diversity in the segments or types of energy customers, and network businesses need to commit to ensure that they **identify and attempt to include views from all relevant stakeholders, including hard-to-reach groups**. More specifically, engagement efforts should:

- » Include more customers in engagement rather than only working with consumer advocates. Note that this approach requires more initial efforts in capacity building, but helps promote more representative outcomes.
- » Not rely on just one group of stakeholders - make an effort to understand the views of representatives that couldn't attend or weren't invited to specific engagement processes. Secondary sources of data or engagement outcomes from other businesses might support these efforts.

Best practice engagement involves making specific and repeated efforts to ensure that all relevant stakeholders, including those that are hard to reach or hard to engage, are included. Further, stakeholder representativeness will be reassessed over time, to keep track of changes in stakeholder populations.

Guidance for engaging with specific groups of stakeholders:

Ethnic Communities Council of NSW. (2015). Cultural Connections - Engaging CALD energy consumers. Available at: www.eccnsw.org.au/What-we-do/Advocacy/Guidelines.aspx

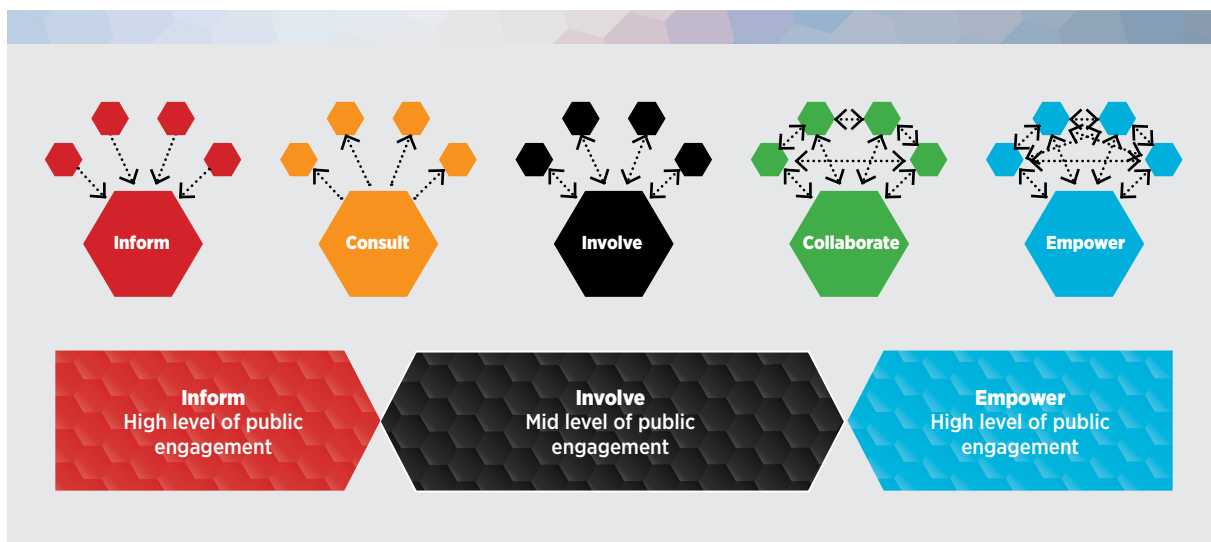
Brackertz, N, & Meredyth, D. (2008). Social inclusion of the hard to reach: community consultation and the hard to reach: local government, social profiling and civic infrastructure: final report. Swinburne Institute for Social Research. Available at: <http://researchbank.swinburne.edu.au/vital/access/manager/Repository/swin:9858>

Effective customer engagement recognises a scale of participation

The 'Public Participation Spectrum' developed by the IAP2 identifies five different levels of community engagement that can exist in any customer engagement program. Customer engagement activities can range from *informing customers*, which involves a one-way communication flow between the business and the public, to empowering customers in decision making regarding business processes. Levels range between *consult, involve and collaborate* in increasing interaction and involvement in business processes. Importantly, the spectrum encourages practitioners to identify the **most appropriate level of engagement for the issue**.

While the best customer engagement strategies will be specific to business and community needs, customer engagement strategies should acknowledge that the building of mutual trust between the energy network business and customers will likely involve objectives beyond simply informing or consulting customers. Conversely, more empowered forms of engagement are not suitable for every topic or context.

Figure 5: The IAP2 Public Participation Spectrum



According to the IAP2, an important part of this spectrum of activities relates to the “promise” that is implicitly (or explicitly) made to the engagement participants. For each level of the spectrum, this promise can be expressed as:

- » **Inform:** We will keep you informed.
- » **Consult:** We will keep you informed, listen to and acknowledge your concerns and aspirations, and provide feedback on how public input influenced the decision. We will seek your feedback on drafts and proposals.
- » **Involve:** We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.
- » **Collaborate:** We will work together with you to formulate solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.
- » **Empower:** We will implement what you decide.

In deciding the appropriate place on the spectrum for a given engagement process, it is important that all participants are aware of what sort of promise is being made by the network business. While customers and other stakeholders might prefer that they are given more control and empowerment, not every business decision can be cast as an opportunity for empowerment. Arguably, it may be better for a network business to be ambitious but not unrealistic, rather than to lead stakeholders to expect a certain level of involvement, and then fail to live up to this expectation. Such an outcome would clearly damage trust, which (as noted earlier) is a central requirement of effective engagement relationships.

Best practice engagement will incorporate the input of stakeholders into choosing the form of engagement used for specific issues or contexts.

Other spectrums or matrixes are available to assist in considering the level of engagement appropriate, including the spectrum detailed in the *AA1000 Stakeholder Engagement Standard*, which provides a framework for assessing, designing, implementing and communicating stakeholder engagement.²

Effective customer engagement is conducted responsibly

One of the key components of building positive relationships is fostering trust and a sense of a business’s legitimacy in the community. Effective customer engagement demonstrates commitment to building relationships. Acting with sensitivity and responsibility when engaging with customers is a fundamental part of this.

Effective engagement also:

- ✓ Values and incorporates customer feedback.
- ✓ Uses suitable avenues to report back to the community about engagement processes and outcomes.
- ✓ Adheres to ethical principles of privacy, confidentiality, respect for persons, and diligence (see below).

Conducting responsible engagement

Across the engagement methods, prevailing regulatory frameworks will affect collection of data from people. If there is a chance that data collected during engagement may be analysed and published as a research report, approval must be sought from a relevant human research ethics committee (this is not required for activities done as part of in-house management). There is also a national code of conduct that governs all research. National privacy laws may apply too. Transparent and consistent application of these frameworks is always recommended, and is particularly important in an environment of distrust or suspicion.

- » The National Statement on Ethical Conduct in Human Research www.nhmrc.gov.au/guidelines-publications/e72
- » The Australian Code for the Responsible Conduct of Research www.nhmrc.gov.au/guidelines-publications/r39
- » Australian Privacy Principles Guidelines www.oaic.gov.au/images/documents/privacy/applying-privacy-law/app-guidelines/APP_guidelines_complete_version_1_March_2014.pdf

2 www.accountability.org/standards/aa1000ses.html

CASE STUDY 2

Purpose

To outline the key lessons from the Powerline Project X and how these continue to influence the Distributor's community and stakeholder engagement approach and the business's drive for continuous improvement.

Context

In late 2011 the Distributor experienced a protracted period of community backlash to the initial consultation phase on the Powerline Project X, which aimed to inform the community about the selection of a line route corridor between Point A and Point B. Although four line routes were generated for internal consideration, only line route four was taken to the community as the preferred line route. This triggered a series of events:

- » After two contentious public meetings and extensive coverage in the local media, the local Member of Parliament (MP) intervened to sponsor a Community Reference Group (CRG) charged with recommending a line route that would have the least impact on the community. The recruitment of CRG members was completed by an independent consultant (Consultant) nominated by the local MP.
 - » The CRG commenced its meetings in July 2012, with the Consultant as the facilitator, and 12 community members, including several members of an activist group that had formed to oppose both the specific line route and the project in general.
 - » The CRG met fortnightly and deliberated for over a year before recommending a line route. During this period the CRG members were thorough in first ascertaining the actual need for the line and then in selecting a line route that they assessed as having the least potential for impact on the community.
 - » The Distributor's regional/senior managers gave significant time to the process, attending all CRG meetings, answering questions extensively, and openly sharing project planning reports and other documentation.
- » The final recommendation of the CRG was a 2km wide route which required further investigation by the Distributor to determine the exact route within the identified area. This was dependent on technical investigations and more engagement with landowners.
 - » Following the final outcome from the CRG, changes were made to the Distributor's security planning criteria that led to the proposed powerline project being deferred indefinitely in 2014.
 - » Despite the project not going ahead, the process of undertaking an open and transparent line selection, involving internal and external stakeholders, has delivered key lessons for the Distributor and proved invaluable in guiding engagement best practice.
 - » Following the conclusion of the CRG process, a review was undertaken with internal and external stakeholders. Key objectives of the project review were to:
 - Identify what was done initially that raised community concerns.
 - Explore what the Distributor did differently during the CRG process.
 - Establish whether the creation of a reactive CRG (and the associated community angst) could be avoided in the future.
 - Define the key principles underpinning the CRG process to identify the key lessons and how they could be applied to major projects and other areas of the business in the future.

The review identified key lessons and provided a range of specific recommendations.

Key Lessons

- » **Process:** The CRG process demonstrated the importance of being transparent and building trust with the community. This experience has supported the development of the Distributor's community engagement approach today, including the process outlined in their Community Engagement Framework developed with the state government and other electricity entities. The Framework provides guidance on key stages of engagement and the consultation strategies to be employed depending upon the context of the project.
- » **Open to genuine engagement:** Although more work remains to be done to ensure community/stakeholder engagement is firmly embedded as business-as-usual for the Distributor, this project has raised significant awareness about the benefits of early and genuine engagement:
 - Within the Distributor there is an increased focus on engaging and working with the business' engagement specialists, to assess and determine at an early project planning stage the most appropriate engagement approach.
 - Depending upon the nature and complexity of a project, the learnings from the CRG emphasise the benefits of approaching the community with a 'problem' to collaboratively resolve, rather than just advising and informing them of the solution the Distributor has already decided upon.
 - Since this experience, the business has also increased its ability to partner effectively with local communities and other stakeholders to look for alternate non-network solutions such as demand management, load shifting and the use of renewable sources.
 - The Distributor has also reenergised its regional stakeholder engagement strategy through the Distributor's 'local faces' – the operational managers accountable for building relationships with key regional stakeholders.

- » **Sharing of information and project planning reports:** Learnings from the CRG show that sharing information and being transparent with the community builds trust. Any information gaps in our communication with the community, as was initially evident with the project, are now recognised to lead to speculation and the spread of inaccurate and reputation-damaging misinformation.
- » **Principles underlying the CRG Process are replicable:** The key principles identified during the project review were *trust, transparency, clear consistent and understandable communication and early engagement*. These are all seen as transferable and are being adopted for other projects across the Distributor's operations.

We recognise that various groups and individuals are impacted by our infrastructure and other projects and that it is important to assess any potential impact and engage appropriately. For our projects an early community impact assessment is required and an engagement strategy tailored.

In doing so, we consider the [IAP2 Core Values and Code of Ethics for Public Participation Practitioners](#), and the [IAP2's Public Participation Spectrum](#).

This is also aligned with the [AER's Consumer Engagement Guideline for Network Service Providers 2013](#) that encourages continuous improvement.

3. METHODS FOR ENGAGEMENT

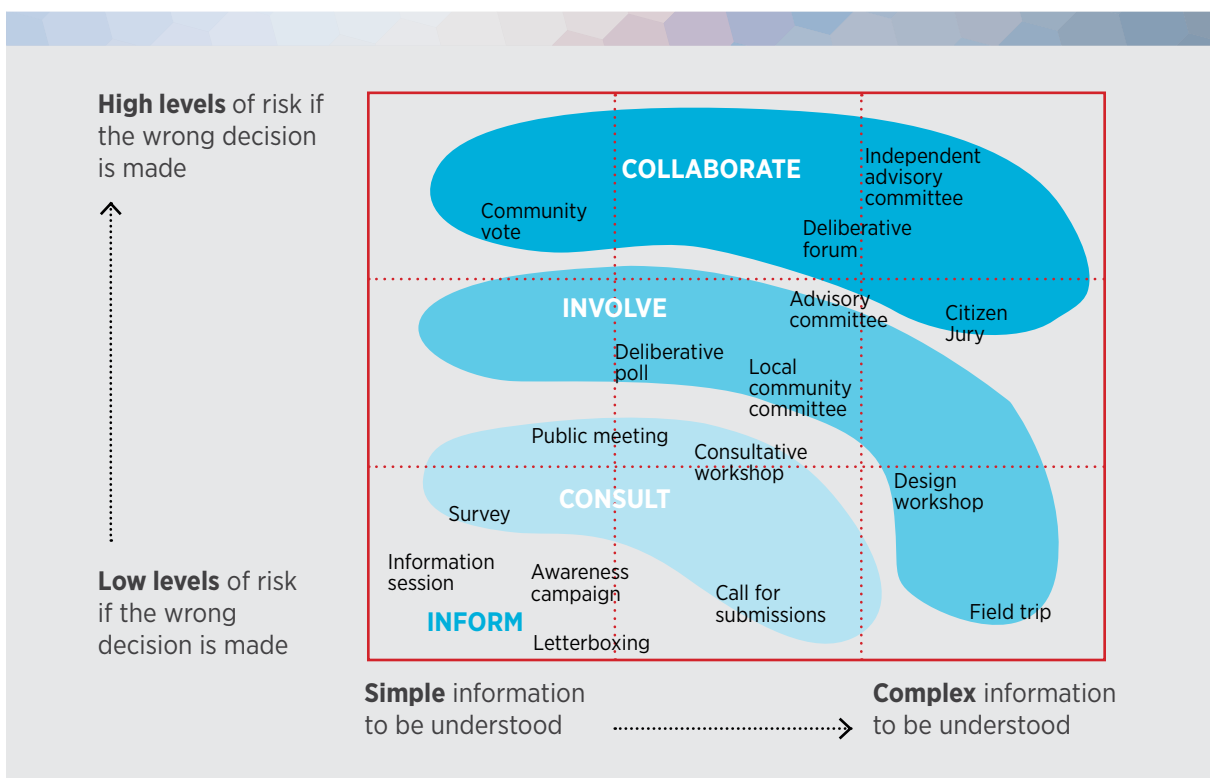
Customer engagement is a complex process and can be represented by a range of activities and experiences, from calling an energy network business’s call centre or accessing a website to the energy network business hosting a community forum or establishing a citizen’s jury.

There are no standard rules for choosing the methods that a company uses to engage with customers. However, companies must ensure that methods selected are suitable for engaging the target group and achieving the engagement goals desired, and are conducted in accordance with ethical principles such as privacy and respect for individuals.

When designing a customer engagement strategy, energy network businesses have a suite of methods available to them with which to build relationships with customers. A combination of these may be drawn upon in order to ensure that they achieve customer participation, as appropriate, across the possible spectrum of engagement levels.

It is important to note that no one method is “best”, and the method chosen needs to be fit for purpose: information sharing methods are inappropriate if the issue is complex and requires substantial input from customers to resolve, and empowerment methods are inappropriate when the business is not able to adjust its behaviour in response to feedback.

Figure 6: Participation matrix with some techniques (adapted from Robinson, 2003).



Methods moving further towards **collaborate** may be more appropriate where networks have more options, longer time horizons for decisions to be made, or for issues that have substantial or variable community impacts. Such methods will also become more appropriate over time as relationships between customers and businesses develop.

Methods towards the **inform** end of the IAP2 spectrum may be more appropriate when the capacity needs to be built (whether of customers, the network provider or both), and for topics where there is no room for negotiation (e.g. issues that do not have substantial price impacts, legal obligations, or safety standards).

In addition, many methods will have applications across any spectrum or matrix of participation levels – they may not fit neatly into one category or another. For example, a community forum could be held to simultaneously share information, consult, collaborate or, depending on how it is designed, to empower customers. Other methods (like direct mail) are more limited in their range of application, but remain valuable in specific contexts. Which method is best will depend on specific needs, including the existing level of knowledge among customers about the issue, the complexity of the information to be imparted, and the level of risk inherent in the specific engagement issue. See Figure 6 above.

The key implication here is that choosing one position on a spectrum for all engagement activity, just like choosing one specific engagement method, is not sensible. Different engagement topics and contexts will require different levels of engagement and different methods. Clearly indicating the specific nature of each engagement activity is an important component of all engagement types (whether it be to inform, consult, involve or collaborate), as it ensures that participants have accurate expectations about how their participation will be used and responded to by the business.

Best practice engagement involves careful work to set clear expectations at the outset of each process. Some specific tips for expectation setting include:

1. For every piece of engagement, show the business's overall engagement plan and show where this specific piece fits.
2. Be clear about what the goals of engagement are, and what the performance measures are, and where on the spectrum of levels the specific process lies.
3. Be clear about the flexibility on an issue before you start engaging – if there are limits to what the business response to the engagement outcomes can be, these need to be clear up front.
4. Ask customers what topics they are interested in and what they want to understand.
5. For engagement that is particularly complex or diverse, it is important to conduct some early engagement to build capacity among customers for subsequent engagement.
6. Be brave about sharing specific business based information with customers.
7. Don't start engagement with the regulatory proposal.
8. Use case studies to explain how people might be affected by proposed changes.

Engagement techniques

The following outlines some common techniques used in customer engagement. Many are already used extensively by energy network businesses.

However, the list presented in this document is *by no means exhaustive*. Useful and comprehensive ‘toolboxes’ of community engagement methods – including instructions, tips and the strengths and weakness of each technique – are publicly available. A variety of excellent resources are outlined in the box below.

Engagement toolboxes and guides

The **Victorian Department of Sustainability and Environment** has produced an excellent compendium of 68 different engagement tools, relates each to the IAP2 participation spectrum, and summarises for each the objectives and outcomes, the uses and weaknesses, the resources required (including personnel), the time required, the cost, a step-by-step summary of the method, and some further references. This guide is available online at: http://www.dse.vic.gov.au/__data/assets/pdf_file/0003/105825/Book_3_-_The_Engagement_Toolkit.pdf

The **Queensland Department of Communities** has also produced a valuable and comprehensive guide to community engagement methods and techniques.

This guide is available online at: www.qld.gov.au/web/community-engagement/guides-factsheets/documents/engaging-queenslanders-methods-and-techniques.pdf

Other sources of engagement guidance/tools:

AA1000 Stakeholder Engagement Standard www.accountability.org/standards/aa1000ses.html

International Association for Public Participation (2015). Quality assurance standard in community and stakeholder engagement. Available at: www.iap2.org.au/resources/quality-assurance-standard

US Environmental Protection Agency. *Public participation guide: Foundational skills, knowledge, and behaviors*. Available at: www2.epa.gov/international-cooperation/public-participation-guide-foundational-skills-knowledge-and-behaviors

US Government Public Participation Playbook: Available at <https://participation.usa.gov/>

Wilson, E, Best, S, Blackmore, E and Ospanova, S (2016). *Meaningful community engagement in the extractive industries: Stakeholder perspectives and research priorities*. International Institute for Environment and Development, London. Available at: <http://pubs.iied.org/16047IIED.html>

World Business Council for Sustainable Development. (2012). *Electric utilities: Empowering consumers*. Conches-Geneva, Switzerland. Available at: www.wbcsd.org/Pages/EDocument/EDocumentDetails.aspx?ID=15260&NoSearchContextKey=true

In addition, Figure 7 below shows the 20 engagement tools used by energy network businesses for their Regulatory Proposals that were identified by AER's Consumer Challenge Panel's 2014 evaluation:

Figure 7: Energy network business engagement tools catalogued by the AER's Consumer Challenge Panel (2014).


| Method | Ausgrid | Endeavour Energy | Essential Energy | ActewAGL | Energex | Ergon Energy | SA Power Networks | TransGrid | Transend | Jemena |
|--------------------------------------|---------|------------------|------------------|----------|---------|--------------|-------------------|-----------|----------|--------|
| Online survey | ▲ | ▲ | ▲ | | ▲ | ▲ | ▲ | ▲ | | |
| Telephone surveys | ▲ | ▲ | | | ▲ | | | | | |
| Directions & priorities paper | | | | | | ▲ | ▲ | | | |
| Consultation paper | | | | | | | | ▲ | | |
| Customer Council meetings | ▲ | | ▲ | | | ▲ | | | | ▲ |
| Listening sessions | | | | | | ▲ | | | | |
| Consumer workshops | | ▲ | | | ▲ | | ▲ | ▲ | ▲ | ▲ |
| Customer discussion groups | | | | | | ▲ | | | | |
| Focus groups | ▲ | ▲ | ▲ | | ▲ | | ▲ | ▲ | | ▲ |
| Stakeholder meetings | ▲ | ▲ | ▲ | | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ |
| Targeted strategic workshops | | | | | | | ▲ | ▲ | | |
| Pricing methodology/tariff structure | | | | | | | | ▲ | ▲ | |
| Website | ▲ | ▲ | | | ▲ | | ▲ | ▲ | | ▲ |
| Facebook campaign | ▲ | ▲ | ▲ | | | | | | | |
| Customer commitments | | | | | | ▲ | | | | |
| Customer engagement strategy | ▲ | ▲ | ▲ | | ▲ | | ▲ | ▲ | | ▲ |
| Media releases | ▲ | | | | | | | | | |
| Stakeholder letters | ▲ | ▲ | | | | | | | | |
| Research | ▲ | ▲ | | | ▲ | | ▲ | | | |
| Willingness to pay research | ▲ | ▲ | | ▲ | ▲ | | ▲ | ▲ | | |
| Cost trade off research | | | | | | ▲ | | | | |
| Media analysis | ▲ | | | | | | | | | |
| Online monitoring | ▲ | | | | | | | | | |

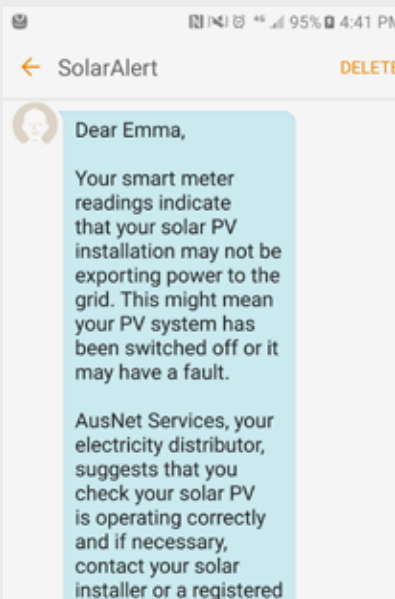
Provide information

Information sharing strategies will underpin any community engagement activity. Effective information provision helps individuals to understand the issue and to decide whether they want to participate in a consultation or a more active participation activity. Energy network businesses may seek to simply provide information to community members (i.e. information provision) or to provide information to the community while also being open to receiving feedback from the community (i.e. information sharing).

Before initiating either information provision or sharing, it is important to be clear on its purpose and message, the target group, the importance and implications of the information to the target group.

The benefits of information provision strategies are that they can quickly inform the community of a specific topic, or alert them to action required. Further, information sessions may be part of a broader engagement process, rather than a stand-alone process. There is an almost inexhaustible number of ways to share information with people. Three common methods that will likely form part of a business' engagement strategy are outlined below.


| | |
|--|--|
| <p>Direct mail</p>  | <p>Direct mail is a method of communication for relatively small amounts of simple information. Mail outs can take the form of fact sheets, letters, newsletters, leaflets, brochures etc., but can also be conducted electronically through e-newsletters, emails or via SMS.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » Cost effective and straightforward. » Can be targeted to subgroups of customers (residential or SME, high-users or low-users). |
| <p>Limitations</p> | <ul style="list-style-type: none"> » Only suitable for small amounts of relatively simple information. » Has limited engagement applications. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ Use mail-outs in combination with other engagement activities. |



AusNet Services solar performance notification

AusNet Services communicates with residential solar customers via SMS when their smart meter data indicates that their solar panels may not be exporting to the grid. Customers receive a message along the following lines, that links the customer back to more information, suggested solutions, and more opportunities to engage on their energy use.

Fact Sheet – Your Solar
www.ausnetservices.com.au/Electricity/Managing+Usage/Your+Solar.html

| | |
|--|---|
| <p>Websites</p>  | <p>Websites are now a common channel for providing information to customers and key stakeholders. Website can be business sites, or can be designed collaboratively around a specific process or issue.</p> <p>Websites can be important for providing information to support the range of community engagement activity as well as providing greater transparency. They are also increasingly being used to support an online community, referred to in the following section for higher levels of participation.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » Cost effective. » Can reach a large number of people. » Can contain a great deal of information that is easily updated. » The interface can be designed to target specific interest groups, and material can be translated to languages other than English. » Can include video, games and other methods to simplify information. » Data regarding number of visits can be collected for analysis. » Numerous new web-based platforms have emerged that allow two-way engagement, including webinars. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » May exclude some customers with no or limited access and/or digital literacy. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ Good website design is important for optimal engagement outcomes. ✓ Provision should be made for customers to make contact with the business, and for timely response. ✓ Monitor this contact for evaluation purposes. |

Webinars on our future pricing

We held a series of stakeholder webinars on our Pricing Proposal in May 2016.

The webinars recap on our tariff reform journey and our forecast revenue requirements - the 'dollars' we pass through in our tariffs. They then look at proposed tariff structures, rates and reforms for each customer group and the customer impacts.

The webinars below cover the Pricing Proposal information separately for the relevant customer groups. Updated slide presentations are available here.

Customers using less than 100MWh a year

Residential and Small Business: Standard Asset Customer - Small

You can view the [slide presentation \(PDF 3.9 mb\)](#) or the webinar below.

Note: The webinar recording has poor audio clarity for the last 10 minutes - the content is in these [Questions and Answers \(PDF 31.2 kb\)](#).




www.ergon.com.au/future-network-tariffs

Transcript

Webinars have become a key tool for Ergon Energy

Webinars are being used to consult on Ergon Energy's network tariff reforms and give greater transparency to the organisation process for setting its tariffs annually in its pricing proposal.

This channel is ideally suited to the large service area that Ergon Energy services, which limits the ability to undertake face to face engagement.

| | |
|--|--|
| <p>Social media</p>  | <p>Social media refers to digital channels that allow the creation, sharing, or exchange of user-generated information, ideas, and pictures/videos with online communities or social networks. These social media applications may include Facebook, Twitter, Instagram and Pinterest, and Snapchat. More specific forms include YouTube, LinkedIn and Research Gate.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » Highly interactive platforms allow businesses to create, discuss, and modify content. » Cost effective and efficient for communicating with some customers. » Allows immediate and real time interaction on issues as they happen, i.e. power interruptions. » Clear data measurement and analytics built in to social media platforms. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » Some types of social media may be more suited to information provision (for example alerts about service interruptions, reminders, etc.). » Requires investment in resources to respond in real time to customer comments and questions. » Can lack the authority and responsiveness of more personal, face-to-face engagement with customers which may be necessary for more complex engagement. » May exclude some customers with no or limited access and/or digital literacy. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ Social media should be included as a package of communication methods to ensure customers with no or limited access and/or digital literacy are still engaged. ✓ Ensure that there are resources available to support your social media engagement. ✓ Tailor your social media strategy to suit the platform used. |





Consult and involve

Consultation provides important opportunities to develop two-way relationships between businesses and customers, and may run parallel with information and collaboration-based strategies. There are a variety of social research methods that allow businesses to engage with customers and better understand their opinions and needs, and these have been included in this section.

Various consultative mechanisms are usually required to explore and consolidate a range of viewpoints and opinions, and a variety of consultation techniques are available. It may be appropriate to use a number of these techniques within an engagement strategy either in sequence or in parallel for example, surveys and focus groups complemented by an online survey.

Five common methods are outlined below.

| | |
|--|---|
| <p>Interviews</p>  | <p>Interviews are one-on-one discussions between a researcher and a subject, to get richer, more personal insight into an issue.</p> <p>In an interview, questions can range from highly structured (questions designed to elicit quantitative or yes/no responses upon specific issues), semi-structured (a mix of questions some of which allow participants the ability to answer in their own words) or unstructured (conversational or open-ended questions such as “Tell me what you think about X”).</p> <p>Interviews can be done on the telephone or face-to-face.</p> <p>Interviews typically result in great deal of qualitative data whereby people have described their experiences, opinions and feelings. This data is then analysed to identify key themes.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » Interviews allow for rich, in depth information to be collected from participants. » When done well, trust and rapport is built between interviewer and participant, which can lead to a positive experience for the participant. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » Like surveys, poorly designed interviews can fail to gain the necessary data or insights. » Interview data can be difficult and time consuming to analyse. » The form and depth of analyses depends on what sort of research questions are being asked. » Care and sensitivity must be exercised by interviewers. » Interview data can be costly to collect, mostly because of the labour involved in talking with people individually, the travel time to interview sites, and the data analysis. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ Interviews should be designed, conducted and analysed by someone with experience in social and market research, and trained in interview techniques. ✓ The design of interviews must consider the selection of who is interviewed, and the phrasing of questions to ensure they are not leading or misleading. ✓ Audio-record interviews for record keeping, and transcribe if necessary. If the interview is not being recorded, a note-taker alongside the interviewer can be invaluable. |

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| <p>Focus groups</p>  | <p>A focus group usually involves convening 8-12 people in a room for 1-2 hours. A convenor engages the group in a discussion about a topic using several open ended questions to guide them. Focus group discussions typically start broad and progressively focus the discussion on to a single question or point. Focus groups are usually recorded via audio or visual equipment.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » The data that can be obtained from the group discussion can be extremely rich, and is one of the most valuable aspects of focus groups. Focus groups can offer deeper insights into complex issues than interviews might, because individuals are exposed to a variety of views rather than just recounting their own. » Focus groups can provide insight into customer decision making and problem solving. The group can be guided to collectively evaluate the costs and benefits of particular business actions, providing insights into the likely reactions of the community to business decisions, and the thought processes and values that a community draws on when assessing these decisions. » The possibilities for focus groups are multi-faceted, because they can be tailored for a number of purposes. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » Because of the relatively small size of focus groups, the benefit of focus groups is depth, not breadth, of opinion and viewpoints. They may not be representative of a broader segment of customers. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ Use an experienced and skilled focus group facilitator otherwise discussions may be diverted or yield few insights, or be hijacked by vocal and dominant participants. ✓ Run several focus groups rather than just one. Ideally, the saturation principle should be followed, with groups run until the investigator is hearing no new information (i.e., the issues are fully canvassed). ✓ Use focus groups in conjunction with other research forms e.g. conducting a broader survey prior to running focus groups provide an important way to delve deeper into issues identified in the surveys. This can also run in reverse order: the extent of opinions or issues identified in focus groups can then be investigated across a broader range of people using surveys. ✓ Take care in selecting who is invited to attend a focus group – the same issues about sample bias that afflict surveys and interviews can also limit insights from focus groups. For some issues it may be appropriate to convene groups comprised of specific customer segments. |



Jemena Electricity Networks - Kildonan UnitingCare workshop


Jemena held focus groups with vulnerable customers in August 2014 as part of their electricity price review engagement. The primary objective was to engage in-depth with a 'hard to reach' yet important group within their customer base on issues which were important to them to inform Jemena's five-year plan. The focus group was attended by 12 customers who were recruited by Kildonan UnitingCare and identified as vulnerable, and was held at Kildonan UnitingCare's office in Broadmeadows.

The focus group introduced the network, explained how network prices influence electricity bills and the price review process (objective: inform). They also discussed what Jemena was doing to assist vulnerable customers and options for assisting vulnerable customers under the five-year plan. (objective: involve).

The feedback from the focus group, together with feedback from other engagement forums such as the Jemena Customer Council, shaped a part of the Jemena price proposal in which they proposed to assist vulnerable customers struggling to pay electricity bills by helping them to replace inefficient appliances and providing them with targeted information about the energy use and bills.

Kildonan UnitingCare Workshop - Assisting vulnerable customers

Jemena: Our customer, stakeholder and community engagement

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| <p>Surveys</p>  | <p>Surveying is a data collection tool, whereby participants are asked to self-report their experiences or opinions via a questionnaire. A survey can collect factual information about customers (e.g. household energy consumption, yearly income), but also information about the knowledge of participants (e.g. levels of awareness about a company) or the feelings and opinions of customers (e.g. levels of acceptance of the energy).</p> <p>A survey questionnaire can be mailed-out, completed over the telephone, or, increasingly, completed on the internet. This can be in the form of an open online community, with an open conversation through a web page. Surveys more often collect quantitative data but can also collect qualitative data.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » Gathers valuable information from a broad population. » Can help businesses explore the extent of issues across their customer base. » If done regularly, they can monitor trends in customers' views over time. » Internet-based surveys, which have become the most common form of surveying large numbers of people, are convenient and cost-effective. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » Require expertise in their design and the analysis. » Poor design may result in biases and erroneous results. » Customer response to surveys (i.e. the proportion of surveys completed and returned) is typically extremely low – a good response is unlikely to exceed 20% or 30% of the surveys administered. » Surveys may exclude some vulnerable customer groups, and are thus unlikely to generate completely representative samples. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ Consult with an experienced social or market researcher when designing surveys. ✓ Approaches to sampling participants (i.e. how to choose the section of the community who answers the survey) are vital. A random sample is advised in most cases. ✓ Telephone surveys, while typically more expensive than other surveys (because of the resources required to administer the survey individually to customers) usually provide better response rates and offer the chance to clarify questions for respondents. ✓ Pilot-test questionnaires for comprehension before administering them in a survey. ✓ Boost response rates by providing incentives (e.g. by offering money, or participation in a competition, for completed responses) or issuing reminders to complete them. ✓ Make the most of existing data available to the company (e.g. internal data plus publicly available data from the ABS) to assess differences between responders and non-responders. |



Queensland Household Energy Survey

Queenslanders have participated in the Annual Queensland Household Energy Survey since 2009.

This survey is run as a partnership by Energex, Ergon Energy and Powerlink and covers several behavioural topics around energy efficiency, appliance saturation and electricity use.

Randomised control trials, choice modelling, and willingness to pay studies



This category of engagement methods refers to conducting realistic experiments, usually with customers, to evaluate things like customers' willingness to pay for new energy arrangements, to assess how they trade-off different energy choices and the effectiveness of interventions designed to affect energy behaviours. They are not traditionally referred to as engagement per se, but the design and/or results of these methods are invaluable to informing business decisions, and even other engagement methods and activities.

Strengths

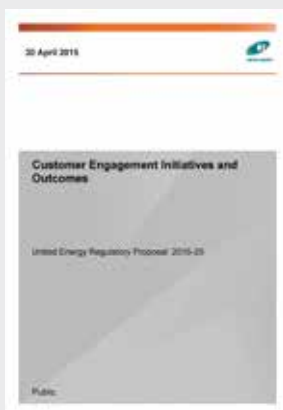
» Because these methods are carefully designed and controlled, they are ideal for drawing confident causal conclusions about what affects customers, and about how customers can be expected to behave in response to specific situations.

Limitations

- » Extensive background knowledge (often from previous market research and/or engagement activities) about the specific situation or choice of interest is needed before these methods can be useful.
- » Findings can still be limited in their application, if the customers selected to participate in the experiments do not adequately represent all customers, or if the operationalisation of experimental interventions is not designed carefully and pilot-tested.
- » When people express a willingness to pay in response to a hypothetical scenario, this is not necessarily the same as what they will actually pay in a real situation. But the relative difference in how much people are willing to pay for different options is useful information about their real preferences.

Tips

- ✓ Use people with expertise in these methods (internal staff or often specialist external consultants) to ensure that they are applied correctly.
- ✓ Designing experiments effectively requires careful trade-offs between a) making the situation as realistic as possible, so that the findings will apply to the real world, and b) tightly controlling the context, so that alternative influences on the findings are reduced or removed.




United Energy Willingness to pay, willingness to trade research

United Energy undertook a best practice survey to assess customers' willingness to pay or trade savings for changes to existing service levels, or the introduction of new services. More than 1,100 people took part to provide final sample of 960 United Energy customers.

For United Energy, the WTP survey provided information about consumers' willingness to pay or trade for particular characteristics of their electricity supply, such as reliability, quality of supply and cost.

The purpose of the survey was to inform the development of United Energy's regulatory proposal for the next regulatory period, using robust methods to understand consumer preferences. It was conducted early in their engagement process in order to inform other engagement practices.

www.aer.gov.au/system/files/United%20Energy%20-%20Customer%20Engagement%20Initiatives%20and%20Outcomes%20-%20April%202015.pdf

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| <p>Community forums</p>  | <p>Community forums are usually one-off or occasional meetings involving both customers and representatives from the business. They are typically used to consult with the local community on a new project or issue. To conduct a community forum, you will need a venue to bring people together with business representatives and experts in the field.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » An efficient way of developing rapport and engaging quickly with a diverse customer base with large numbers of interested people. » Allows two-way communication, so that communities of customers can communicate their concerns and hear the business's perspective in the same sitting. » Internal decision makers and subject matter experts can hear feedback directly from the relevant stakeholders. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » These processes can be time- and resource-intensive, for all parties involved. » Community group events can be heavily influenced or distracted by a small number of vocal attendees who do not necessarily represent views of wider customer segments or groups. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ A facilitator can keep the discussion on track. ✓ Build and/or maintain trust through the use of impartial and respected experts in the field. ✓ Use senior company representatives when the issues are sensitive so that they can speak authoritatively and honestly. ✓ Make clear that two-way communication is the goal. Depending on the reason for holding the community forum, it is often useful to collect written responses to a few brief questions about community participants' views. ✓ Agree on actions for the business to take as a result of the communication and act on them. Provide feedback to attendees. |



Powerlink Queensland Transmission Network Forum

In July 2015, Powerlink held a Transmission Network Forum to discuss the future of Queensland's transmission network.

The forum commenced with a presentation on Powerlink's Transmission Annual Planning Report (TAPR), followed by concurrent breakout sessions covering key topics of interest that Powerlink was seeking input on. The three breakout sessions involved interactive discussions on their upcoming Revenue Proposal to the regulator, optimising their network planning, and how they can best consider new technology in energy and demand forecasts.

www.powerlink.com.au/Community_and_Environment/Stakeholder_Engagement/Engagement_Forums.aspx



ActewAGL Distribution Electricity Tariff Workshop

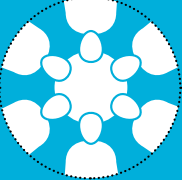
In the ACT, a workshop involving residential and low voltage business customers explored the likely change in behaviour as a result of introducing more cost-reflective electricity tariffs. Subject matter experts provided background and context. A facilitator used real-life scenarios to help participants consider the likely impacts of tariffs changes on different customer types. These impacts were captured through a series of exercises and worksheets. Feedback from participants at the end of the workshop was very positive with over 80% rating the workshop techniques a 5 out of 5 on a sliding scale. Outcomes from the workshop informed the development of subsequent Tariff Structure Statements.

Collaborate and empower

There are international trends towards increasing inclusiveness of citizen opinions and values in business and public governance, so that engagement moves beyond information sharing and consultation to more actively involving customers and communities in planning and decision making processes. These methods are most useful when there is a specific issue to be addressed which is complex or contested,

and/or when the business and customers are both willing for the customers to have greater empowerment in influencing business outcomes.

A range of active participation techniques are available, and these should be implemented in conjunction with effective information and consultation programs. The methods below are only a small sample – for a more comprehensive set of active participation tools see the Victorian and Queensland government engagement toolkits in the Resources section.

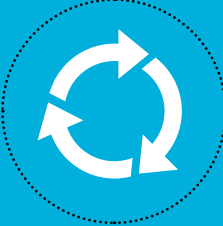
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| <p>Consumer panels</p>  | <p>This method for customer engagement is ideally suited for empowerment engagement activities, but can be used more broadly too.</p> <p>Consumer panels identify groups of customers who become key informants. Members are usually invited to participate because they have special expertise or interest in a topic, and they may become representative experts about that topic. Consumer panels can be relatively small, but have also been convened with numbers up to 100 and above.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » Access is open to a wide range of people including minority groups. » A timely and economical way to test new ideas and plans. » Views can be tracked and measured over time, although care needs to be taken with interpreting results given panel membership changes over time. » Because panels are convened over the long term (in contrast to focus groups for example) members have time to develop a sound understanding of issues and there is potential to build rapport between participants and businesses. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » Sustaining the interest and availability of panel members over the long term can be difficult, and members can pull out of the panels before their term expires. » Resource intensive to establish, and requires ongoing commitment from all parties involved. » There is a risk that as some representatives become more informed they become less representative of the community. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ More work up front in ensuring a diversity of views and backgrounds among panel members has many positive benefits over the life of the panel. ✓ It is important to focus on the aim of the panel as being to provide alternative views, not necessarily to reach consensus. |



ElectraNet Consumer Advisory Panel

In 2015, ElectraNet established a Consumer Advisory Panel comprising representatives of a broad range of consumer groups with the role of providing consumer input to improve the value of electricity transmission services in South Australia.

It operates under an independent facilitator and provides advice and feedback on consumer needs and issues to inform ElectraNet's planning and revenue proposals, guidance on ElectraNet's consumer engagement activities, and its proceedings are published on ElectraNet's website.

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| <p>Action research</p>  | <p>Action research refers to a set of research methods that enables network businesses, community members and others to explore issues, difficulties and experiences in a collaborative and participative way and to identify and test solutions.</p> <p>Action research can be defined as ‘learning by doing’ and involves a cyclical process which includes identifying a problem, planning, taking action, reflecting on outcomes and amending action based on evolving understanding. The primary difference between action research and other research is that it deliberately seeks to engage stakeholders as active participants in the research and learning process. It also differs from traditional models of research due to its iterative orientation and because it is often led internally by staff and stakeholders rather than by an external expert.</p> <p>For action research to be effective, practitioners need to sensitively engage with stakeholders, either one-on-one or in groups, and build trusting relationships within which experiences and needs can be explored. Interviews, surveys, focus groups and informal meetings can be used to support the research process. There is a high emphasis on collecting and analysing qualitative, rather than quantitative data.</p> |
| <p>Strengths</p> | <ul style="list-style-type: none"> » Is highly inclusive – it can be used with any stakeholder group and is also appropriate for socially excluded groups. » Is flexible and responsive – gives businesses and customers the ability to develop/reformulate the research agenda in parallel with the project work. » Supports iterative learning, problem solving and solution testing. |
| <p>Limitations</p> | <ul style="list-style-type: none"> » Because this approach is highly driven by customers, it can lose focus unless the research question is tightly defined. » Qualitative data generated via action research processes requires expertise to interpret. |
| <p>Tips</p> | <ul style="list-style-type: none"> ✓ Action research programs are best designed with input from experienced practitioners in participatory research. |

CASE STUDY 3

Background

As a recently formed entity, Distributor Y faced a number of challenges as it aimed to balance the need to maintain a safe, reliable network with customer expectations in regard to service, electricity prices and shareholder expectations.

As the cornerstone of the customer service strategy, 'The Voice of the Customer' (VoC) Program was established to ensure the perspective and 'voice' of customers were considered in the business's activities and decisions. Its aim was to establish a platform from which the customer engagement framework, service improvement, customer culture and satisfaction measurement would evolve.

Goal of Engagement

The VoC Program aligned with Distributor Y's business excellence program and focus on continuous improvement of processes, tools and systems. This element of the strategy is aimed at delivering consistent, repeatable and exceptional customer service and first contact resolution. A key initiative to deliver on this strategy was an in depth review of the customer connections process to identify service gaps and make improvements to Distributor Y's services where necessary.

What Processes Were Used

In December 2014, in conjunction with an external consulting firm, Distributor Y undertook internal workshops with key stakeholders involved in the end-to-end customer connection process. The objective of these workshops was to take a customer's view of the connection process, assess whether their needs were being met and agree as a business on the actions needed to meet these needs.

Some of the key messages to come from this exercise were:

- » 'Information is confusing'
- » 'I was not advised of all of the information up front'
- » 'I get incorrect verbal advice'
- » 'I don't trust the information provided'
- » 'the process is too complex and takes too long'
- » 'I want proactive issue resolution'
- » 'I want to speak with someone who knows my history and understands my problem'

To better understand the customers' requirements, Distributor Y mapped the customer's journey through the connection process, using feedback from stakeholders. This included shareholder ministers, key industry bodies, major property developers and service providers. Through this activity the customers' needs and pain points were identified. The business then assessed its current performance in meeting each of these needs.

Outcomes of engagement

A product from the review of the customer connections process was the development of two Customer Journey Maps; one for basic connections and one for complex connections. Both maps were further dissected to identify key customer pain points, and ultimately resulted in over 120 process improvements and initiatives being recognised.

How were outcomes implemented in the wider business?

The initial register of improvements was further rationalised and grouped into five key themes or streams of work as follows:

- » **Simplifying connection information:** correspondence, website and brochures.
- » **Early collaboration with customers and their agents to clarify expectations upfront:** A formal forum focused on early engagement was implemented in July 2015. This forum allows our complex connection customers to discuss their approach to their developments at an early stage so that there are no surprises in relation to costs of services and the exploration of options that are available. Developers have advised that the process was enlightening and better than they had expected. This forum can also be used by builders and electricians for basic connections.
- » **Providing a single point of contact within Distributor Y for each connection:** the name and contact details of the connection's case manager are now provided on the letter of offer and other correspondence.
- » **End-to-end internal process improvement and simplification:** Improvements identified through the customer journey mapping process included providing greater transparency of the connection process and associated fees, as well as providing the ability to choose who undertakes the design and construction of new electrical infrastructure.
- » **Provide visibility of the connection processes:** this is being provided through the development of an online connection application portal.

These key initiatives were implemented with the endorsement of and strong support from senior management, using cross-business unit working groups.

Learning

The benefits from the customer connections process review have been:

- » Early engagement with customers
- » Communication improvement and development
 - across internal teams in the connection process
 - with customers throughout the process lifecycle
- » Increased collaboration
 - with customers to understand expectations and responsibilities of all parties
 - with staff to clarify what each team does in the process, their needs, expectations and responsibilities
- » Better visibility for customers and operational teams as required across the process journey, and
- » Introduction of the connection choice model
 - a mechanism to allow the choice of designer and constructor for defined scopes of work.

In February 2016, a customer connection roadshow was undertaken with key internal process owners and subject matter experts who hosted internal and external sessions in key locations around the state. These forums explained to key stakeholders the initiatives that were undertaken in response to customer concerns and pain points.

Feedback from these stakeholders, as well as the business's shareholders, has been positive. They are appreciative of the work being undertaken to improve connection processes including the introduction of the early engagement process and connection choice model.

4. SHARING ENGAGEMENT OUTPUTS

Sharing the results and outputs of engagement fosters transparency between businesses and customers. It is important for building trusting relationships and so it is vital that sharing outputs and providing feedback to customers and other stakeholders be built into customer engagement strategies in the planning and design stages.

Participants are often interested in receiving a summary of the full range of information generated via an engagement process and how this is being considered. Sharing summary materials across groups is often an effective way of raising awareness, and can lay the foundations for relationships and consensus-building.

Figure 8: Sharing the outcomes of feedback: an example³

You said

You have told us that identifying and understanding our role in the electricity supply chain can be difficult. This includes:

- » A limited understanding of the electricity supply chain and its key components.
- » A limited understanding of the changes in the electricity industry, the level of investment required, its impact on electricity cost and how it impacts you.
- » Limited knowledge of where and who to get information on topics such as network tariffs, tariff development and pricing.
- » Limited avenues to provide collective feedback such as a reference group or customer council.

We will do

We will develop and carry out engagement activities that will improve your understanding of the distribution section within the electricity supply chain. We will do this by:

- » Clearly explaining our role as a distributor in the supply chain.
- » Reassessing how we communicate with you.
- » Communicating with you about topics that can be complex or confusing such as network tariffs, tariff development and pricing.
- » Looking at establishing a customer council or reference group where we can seek advice on key topics.

³ Energex (2015) *Connecting with you: Customer Engagement Strategy 2015-2020*
www.energex.com.au/__data/assets/pdf_file/0008/196253/Customer-Engagement-Strategy.pdf

Providing feedback benefits customers who have participated in an engagement process, by allowing them to see how their views have been accurately incorporated into decision making. Without feedback, customers and other stakeholders may assume businesses are not listening and may not know whether their contribution has made a difference. Both situations are likely to result in a reluctance to participate in future engagement processes, and a loss of trust in a business and the industry.

Simultaneously, sharing the outcomes of engagement with other stakeholders (within and outside the network business), strengthens and supports the industry more broadly by enabling shared learning and collective improvement.

The range of feedback loops that relate to sharing engagement outcomes are illustrated below.

Table 1: Feedback loops for sharing engagement outcomes

| Feedback from→ | Feedback to: | Information/Purpose |
|--|--|--|
| Network business staff directly involved in engagement | Engagement participants | <ol style="list-style-type: none"> 1. Background information about engagement plans and purpose 2. Feedback about what the business has changed in response to engagement |
| Engagement participants | Network business staff directly involved in engagement | <ol style="list-style-type: none"> 1. Content from the engagement – addresses the goal of the engagement activity 2. Evaluation of the engagement process – addresses the development of current and future engagement efforts |
| Network business staff directly involved in engagement | Network business as a whole | <ol style="list-style-type: none"> 1. Content from the engagement – passes on information from engagement to influence rest of the business 2. Future engagement plans – to coordinate businesses responses |
| Network business as a whole | Network business staff directly involved in engagement | <ol style="list-style-type: none"> 1. Responses to engagement – information about what the business can and will change 2. Requests for specific engagement – what future engagement is required |
| Network business staff directly involved in engagement | Staff involved in engagement from other network businesses | <ol style="list-style-type: none"> 1. Sharing results of engagement and plans for future engagement 2. Discussing engagement processes |
| Network business as a whole | The regulator, other network businesses, energy retailers, newly emerging energy businesses, other governmental agencies | Regulatory proposals, sectoral reform, policy planning |
| The regulator | Network business as a whole | <ol style="list-style-type: none"> 1. Feedback from regulatory proposals 2. Other more general feedback (e.g. engagement guidelines) |

When should feedback and follow-up occur?

It is important to establish a protocol during the planning and design phase of an engagement process that outlines when and how feedback will be provided, and also what information will be shared with whom.

Depending on the nature of the engagement, feedback might be offered at regular intervals, and/or within a pre-determined period after each engagement activity and after further opportunities to be involved. Feedback and follow up should generally be incorporated throughout the engagement process.

How should feedback be given?

A range of feedback techniques should be employed to reach a variety of participants. Depending on the group you are seeking to provide feedback to, it may be important to use both written and verbal feedback methods. It is usually important to provide people with information, but also to create opportunities for them to ask questions or to seek additional information if required. In this way, the provision of feedback about engagement itself becomes an opportunity for engagement.

Some techniques for disseminating feedback to engagement participants include:

- » letters to all participants – via mail or email
- » developing a dedicated online community via social media or other platforms
- » disseminating summary reports of meetings/workshops
- » acknowledging written submissions (including how these were responded to)
- » providing information via telephone hotlines
- » holding presentations to customer groups to relay findings, outcomes, progress (or including this in the agenda at consecutive forums)
- » publishing newsletters, charts and posters
- » establishing a specific website for community engagement issues and online reports
- » issuing media releases and updates
- » more informal communications

Other more customised techniques (e.g. specialised meetings, fact sheets, regular updates) are more suitable for feedback to and from other stakeholders like the larger network business and other network businesses.

Best practice engagement will use the forms and channels of feedback that stakeholders themselves prefer, in order to provide feedback about engagement process outcomes and subsequent business actions. Further, opportunities will be provided to stakeholders to engage further on the feedback, to discuss the outcomes and their implications, and to plan subsequent steps.

CASE STUDY 4

The development of *Gas Access Arrangement (AA) information for 2016-21* provided an important opportunity for Distributor Z to test the effectiveness of its recently developed Consumer Engagement Strategy. The Consumer Engagement Strategy established a framework within which the consumer engagement associated with the AA was delivered. This framework provided:

- » Access to the Distributor's energy consumer reference council (ECRC) which brings together a representative group of consumer advocacy organisations
- » Principles of engagement to guide the consumer program. These principles are:
 - Clear, accurate and timely information
 - Accessible and inclusive
 - Transparency
 - Measurable
 - Long term

Engagement

The objectives of the consumer engagement program were defined with reference to the IAP2 Engagement Spectrum and were defined as:

- » *Inform, consult* and *involve* gas consumers and other members of the community; and
- » *Collaborate* with the ECRC in the development of the access arrangement proposal.

These objectives were achieved with varying levels of success.

With respect to gas consumers and other members of the community, participants were certainly informed and consulted but engagement at the involved (meaningful discussion) level was limited. The number of participants across the engagement program was also low, thereby limiting the range of views and input.

With respect to the ECRC, collaboration was achieved in the sense that the ECRC became true partners in discussion of a number of decisions made prior to finalising the AA. However, due to the tight timeframe of the consultation, there were broader areas that were unable to be explored during the engagement process that may have benefited from the considered input of the members of the ECRC.

The key features of the AA Consumer Engagement program included:

- » Active presentation and discussion with the ECRC over six meetings
- » Issue of a consultation paper that outlined the broad AA objectives and principles supported by an addendum that provided further detail as a preferred price path and proposed tariff structures were developed
- » Business and community workshops
- » Online survey of customers attracting 200 participants
- » One-on-one meetings with major customers
- » Retailer discussions on an individual basis
- » Regular reporting and feedback to consumers through direct email and a targeted consumer engagement area of the website
- » Publishing a final consultation report which outlined feedback from consumers and how Distributor Z responded to that feedback

The ECRC played two distinct roles in the consumer engagement program:

- » Input and guidance to the consumer engagement program itself, including reviewing draft consultation papers and distributing information to their constituents
- » Collaborating with Distributor Z on key areas and priorities for the AA proposal

Consumer engagement KPIs were established as part of the program development phase and monitored throughout implementation, including a KPI workshop with ECRC members as part of measuring success and identifying areas for improvement.

Outcomes

In keeping with the objectives of the consumer engagement program, more collaborative based discussions and feedback was received from the ECRC. Feedback from the ECRC related to a wide range of areas of the AA proposal including the price determination process; price path, tariff structures and services; operational expenditure; capital expenditure program; WACC; and consumer engagement.

General consumers and community members provided broader feedback on the AA information. Views of general consumers are broadly summarised as follows:

- » Confusion about the respective roles of distribution and retail businesses
- » Value safety and reliability
- » Want price stability and certainty
- » Want to support vulnerable customers
- » Are interested in what the long term energy infrastructure looks like for the state
- » Are keen to be involved in future energy discussions

One-on-one meetings with large customers and retailers provided direct feedback, particularly on services, the tariff structure and tariff-assignment processes.

The contribution of the ECRC to the quality and content of published materials and format of consumer engagement activities strengthened the consumer engagement program and ensured stakeholder groups were not overlooked.

The outcomes of the consumer engagement program helped to inform the AA proposal by providing a direct 'voice' into senior management meetings as the proposal was developed. This was then able to be further reflected through the proposal to the AER and the Consumer Challenge Panel.

Information provided back to all participants at the conclusion of the consumer engagement program included a table of feedback received with clear information on how Distributor Z addressed each area of feedback.

Lessons learned

There were a number of strengths to the consumer engagement program that will be adapted and built on in future consumer engagement projects. These include:

- » Ensuring high level executive buy-in at the ECRC and other consumer forums. This allows senior members of the executive to listen directly to consumers and stakeholders and understand the drivers behind consumer opinion.
- » An independent chairperson for the ECRC ensured a level of independence in the discussions by the group and allowed subject matter experts and representatives of Distributor Z to focus on their roles and information, rather than facilitating the meeting. The independent chairperson was supported by a facilitator as required. The use of an independent chairperson was welcomed by the regulator.
- » The consultation paper provided a good resource to start the engagement conversations, but needed to be supported by presentations and discussions.
- » One-on-one sessions with key stakeholders such as large customers and retailers were well received and provided a good opportunity to explore specific issues and better understand the views of different stakeholder groups.
- » Engaging with the ECRC on the development of content and implementation of the consumer engagement program established buy-in which prompted members of the ECRC to encourage other groups and members to participate in the program.
- » Over the course of the engagement program the ECRC developed into a well-informed, robust contributor which will be a valuable resource for future regulatory consumer engagement programs.

Although Distributor Z was able to demonstrate to the regulator a strong level of consumer engagement throughout the development of the AA proposal, there were a number of areas where better outcomes could have been achieved.

- » The ECRC provided strong advice that the consumer engagement program relied too heavily on PowerPoint presentations given at meetings, whereas pre-meeting papers may have helped members to be better prepared to contribute to discussions.
- » Although the consumer engagement program extended over six months, this timeframe was still too short in terms of the amount of information to be shared and complexity of issues to be discussed. A longer period of time to allow many conversations that build understanding across all participants would allow greater engagement on more complex issues.
- » There was considerable misunderstanding by all participants about the nature of the Distributor's business. This required an investment of time at all sessions to explain the energy distribution network and market.
- » Participation in the program by the general community was low and longer lead time to allow more promotion of consumer forums may have attracted greater attendance.

Benefits to the Distributor

The consumer engagement program delivered clear benefits for Distributor Z including:

- » Developing a robust AA and five year plan for gas that reflects customers' values and expectations.
- » Adopting a price-path and tariff structure that addresses consumer needs for stability and certainty.
- » Better understanding consumer expectations around the sustainability of gas infrastructure as emerging technologies deliver greater environmental outcomes.
- » Demonstrating to our consumers a willingness to engage with and understand customer experiences and needs, and creating a framework for continued conversations.
- » Demonstrating to the regulator how community input informed the development of the AA proposal.
- » Fostering an internal realisation that consumer engagement can benefit the organisation in a number of areas.

5. EVALUATING CUSTOMER ENGAGEMENT

Effective evaluation is paramount to effective customer engagement. **Customer engagement activities must be documented, and their outcomes and impacts evaluated.**

Effective evaluation requires reliable and valid measurement of key indicators. However, despite the importance of customer engagement, and the value in continuous improvement, there are few standard measures to evaluate success. Evaluation, like engagement itself, must be tailored to the specific needs of the business.

This material focuses on **formal** criteria that might contribute to the evaluation of customer engagement; however, it is acknowledged that **informal** evaluation through ongoing interaction with key stakeholders can (and should) be used to assist in ongoing improvement of the engagement processes.

The difference between key performance indicators and metrics

Both key performance indicators (KPI) and metrics are directly related to a business's **goals and objectives for engagement.**

Something becomes a **KPI** when it can be used to **indicate** how successful an energy network business has been in achieving a particular engagement objective.

Something is a metric when it can be used as a **quantifiable measure** for tracking, monitoring or assessing the success of engagement against a KPI.

An example:

If an energy network business's **engagement goal** was to increase levels of customer awareness of the energy supply chain:

- » A **KPI** might be the extent of knowledge of the supply chain technology in a target customer group, or the accuracy of this knowledge.
- » A **metric** might be the number of people within a specified customer group who has heard of the term 'energy supply chain', or the number who can accurately define what the term means.

Key performance indicators

KPIs for evaluating the success of a customer engagement strategy should be developed as part of the planning process. Deciding on measures to use to indicate progress and success will depend on the specific purpose and goals that an energy network business has for its customer engagement activities. Choosing the right KPIs relies on a thorough understanding of what the objectives of customer engagement are.

Performance indicators for customer engagement activities must be appropriate to the aims and methods of those activities. Activities should be designed as part of a long-term engagement strategy, and performance indicators should be planned similarly. It is the **body of evidence collected from a suite of indicators applied consistently over time that leads to robust, confident conclusions about the effectiveness of engagement activities.**

The best performance indicators:

- ✓ **Line up with the objectives of the engagement activity.** KPIs need to be an actual indication of engagement progress.
- ✓ **Are fit for purpose, developed with consideration to the type of evaluation that is being conducted.** A **summative evaluation** typically involves assessing or “scoring” how well the engagement was done, while a **formative evaluation** is used to identify what should be changed for the next time the same sort of engagement is conducted. Often, an evaluation will include both summative and formative measures.
- ✓ **Are not overly-complicated or over-engineered.**
- ✓ **Are consistent over time and (where possible) consistent between different engagement methods.**

- ✓ **Are developed with consideration for future consultation and engagement.** Consideration needs to be given to whether results will be made public and who will see them, and how the energy network business will report back to customers and stakeholders who participate in the evaluation.
- ✓ **Are appropriate to a specific timeframe.** Many engagement activities will have measurable effects that are short-lived. Other activities may have effects that will not be observable for some time. Indicators must address this temporality.
- ✓ **Have been developed with consideration as to how required data will be collected.** Some indicators might involve resource-intensive research (e.g. interviews or surveys) in order to measure them. Indirect, or naturally-occurring, indicators may be a less intensive addition to the range of indicators being included. Such indicators measured for purposes other than the assessment of engagement may have value as measures of engagement – a measure can be fit for purpose without having been designed for that purpose.
- ✓ **Allow internal monitoring and documentation by energy network businesses of what has changed because of the engagement.**

Types of performance indicators

There are a number of potential indicators to measure customer engagement. When evaluating a customer engagement program, it may be useful to distinguish between input indicators, outcome indicators, and process indicators.

Table 2: Three types of performance indicators

| | |
|---------------------------|---|
| Input indicators | Input indicators are measures that reflect something that an energy network business has done that can reasonably be expected to have an influence on an outcome of customer engagement. For example, an energy network business might track the number of people engaged over a year as a broad indicator of the extent of their engagement activity. |
| | <p>Benefits As input indicators typically involve the actions of energy network businesses rather than the outcomes of customer engagement, data on these types of indicators would likely be easier to collect.</p> <p>Drawbacks Although they may be easy to measure, the difficulty lies in identifying input indicators that will allow for a conclusive link between the input and the desired engagement outcome. For example, one cannot be entirely sure that the number of people engaged will necessarily equate with better engagement.</p> |
| Outcome indicators | Outcome indicators are measures of the result of a specific engagement action. For example, if an energy network business produced a range of customer information material with the goal of increasing customers' awareness of the energy network, an outcome indicator for this engagement action might be levels of awareness in the target audience regarding some aspect of the energy network. |
| | <p>Benefits Outcome indicators provide the most direct measure for whether or not the desired goal of customer engagement is being achieved in the target group. Such indicators, importantly, are the most appropriate means of tracking the outcomes of engagement from the perspective of the customers and stakeholders involved, including whether they were satisfied with the process and the outcomes.</p> <p>Drawbacks It can be difficult to identify outcome indicators that can be clearly shown to be a "pure" or "direct" result of particular engagement activities, and not a result of additional factors. For example, increased levels of awareness regarding some aspect of the energy network may be a result of increased dissemination of information by an energy network business, but also may be the result of an increased profile of the industry in the media. Such alternative explanations can be reduced or removed by using pre- and post-measures or other experimental designs.</p> |
| Process indicators | Process indicators are measures that reflect the operation or the engagement process itself: the processes by which input indicators are converted into outcomes. For example, the quality of an engagement process might itself be measured, with the presumption that higher quality engagement will result in better engagement outcomes. |
| | <p>Benefits Because process indicators have "cleaner" links to the engagement strategy, they can be preferable to input or outcome indicators.</p> <p>Drawbacks Process indicators are generally more difficult to identify and develop, and as a result are less commonly measured in existing data collection work. While a high quality process indicator with a clear and logical link to the capital being assessed is the ideal situation, it will probably be rare in practice.</p> |

Potential engagement metrics

A primary consideration when developing metrics to assess engagement outcomes is that **people who are engaged should be able to identify where and how the business has taken their feedback into account**. Other methods for effectively assessing engagement include:

1. Ensure that feedback/outcomes/ explanations/conclusions are fed back to engagement participants. This is a vitally important part of 'closing the loop' in the engagement dialogue.
2. Compare engaged stakeholder demographics with customer base demographics to ensure engagement is representative.
3. Measure internal engagement or buy-in with the rest of the network business. Although measuring this buy-in across the whole of the network business may be unrealistic, it should at least be possible to keep track of the involvement of the CEO, senior management and boards in engagement planning, processes and responses.
4. Assess and report on the level of business decisions that were the subject of visible public engagement processes.
5. Track the AER's acceptance of proposals that incorporated engagement outputs.
6. Measure the quality of engagement processes (not just outcomes).

Assess whether stakeholders **support** the engagement outcome, or at the very least **understand** it. It can be difficult to measure this support or understanding unless it is built into the engagement plan in advance; getting back in touch with former engagement participants can be difficult unless they are forewarned.

Metrics

What makes an effective metric? Effective metrics....

✓ Are clearly linked to engagement goals and KPIs

Evaluation should be clearly linked to an energy network business' overall engagement plan and/ or a specific engagement plan, with a clear and logical argument linking each metric to KPIs and the goals of customer engagement.

Different metrics are suited to different purposes. Simple, abstract metrics that allow for a rapid overview of the level of customer engagement (e.g. an average "satisfaction rating" after engagement processes) may be useful for comparing between engagement outcomes for the whole network business from one year to the next. Such metrics, however, are not at all useful for identifying contextual issues (e.g. the nature of community concerns within a particular geographic area).

✓ Are consistent

To ensure that the relationship between energy network engagement practices and customer engagement is measured effectively, it is best to ensure that the same metrics are measured over time. In practice, consistency of measurement can come at the cost of sensitivity – the capacity of a measure to reflect small changes in capacity between different areas or over different times. Sensitivity of measurement generally requires specific data for small areas and narrow windows of time, and these features make consistency of measurement very difficult to achieve. Sensitive measures of customer engagement for one particular community are unlikely to be consistent with other sensitive measures of human capital in a different sector. Making measures more "generic" so that they can be successfully compared between sectors will have the inevitable consequence of reducing their sensitivity. Therefore, a measure can be designed with sensitivity or comparison between sectors in mind, but not both.

✓ Have a defined scale

The way a measure is defined involves several components. The most obvious of these is measurement scale, which refers to the nature of the score used to record levels of the measure. To give some examples, an indicator can measure a simple count (e.g. number of customers), a rate (number of complaints per year), a proportion (percentage of customers who have been engaged), or a score on some more abstract scale (quality of a focus group rated out of 5).

Both temporal and geographic scales of metrics are also important considerations. Temporal scale refers to the time period on which metrics are based. Monthly data, for example, is more sensitive to changes over time than data which are gathered only every year, but is obviously more difficult and costly to collect. Geographic or spatial scale refers to the physical area on which metrics are based. Data can be collected from individuals or households, or larger groupings like suburbs, or substations or other network-based measures.

✓ Allow for validation

Validation refers to a process of collecting evidence that a metric accurately reflects what it is intended to measure. As noted earlier, customer engagement can only ever be measured indirectly; there is no way to develop a single “perfect” metric of engagement. Instead, evidence needs to be gathered to support a claim that the metric is meaningfully linked to an engagement KPI (and therefore progress towards an engagement goal). If a metric cannot be validated, it needs to be adjusted or replaced with a metric that has stronger evidence for accurately reflecting the aspect of engagement being measured.

Steps for developing metrics

Step 1: Clearly articulate the goals and objectives for customer engagement

The importance of clear goals and objectives is a key part of customer engagement and developing measures is no exception. Good metrics will be developed in close conjunction with KPIs and the overarching goals of engagement.

Step 2: Identify the spatial and temporal scale of measurement

Spatial scale: How geographically precise can the assessment of the metric be? For example, can a metric be gathered for every individual person, only for each household, or only for each suburb or larger region?

Temporal scale: How often can the metric be assessed? Can data on the metric be gathered every single time an engagement process is conducted, every year, or only once every three years?

It would arguably be ideal if all metrics shared consistent and fine-grained temporal and spatial scales, because this avoids added complexity when combining metrics. However, this situation is unlikely to be achievable in practice.

Step 3: Identify multiple potential metrics

Specific measures will vary in their quality, availability and usefulness, so it is not advisable to focus too quickly on a small number of preferred metrics. Rather, an iterative process is suggested, where multiple potential metrics are identified and assessed (this step), and then this pool of metrics is reduced (the next step).

Since no single metric is able to provide a comprehensive measure of engagement, it is necessary to “triangulate” by gathering multiple metrics. Since engagement involves several components, it is appropriate to aim to find one or more measures that correspond to each component. Using multiple metrics also helps to reduce the potential for error associated with any single metric. Conversely, using more metrics requires more time and resources.

Step 4: Reduce the number of potential metrics

As noted above, potential metrics should be winnowed down to a subset of the most useful, by either removing those with the worst characteristics or selecting those with the best characteristics. A range of criteria for the inclusion and exclusion of measures are described in the table below.

Step 5: Combine chosen metrics into summary measures (optional)

Combining multiple metrics together allows network businesses to report on and track a more global summary measure of engagement performance over time. This approach has advantages, but it cannot be used in every case with every metric. For example, individual customer satisfaction scores (measured after each customer workshop) cannot be directly combined with number of customer complaints (measured annually for the entire network business). Metrics can only be combined into a single summary measure when they can be expressed at the same temporal and spatial scale. Fundamentally, two approaches are available: **aggregating** data from fine-grained indicators to match a more coarsely-measured indicator, or **disaggregating** the data from coarsely-measured indicators.

Aggregating is a fairly straightforward process of averaging across (say) five consecutive annual measures to produce a single five-yearly measure. The same aggregation process can be used to combine spatially-specific data to produce a single measurement for a larger region.

Clearly, this process results in a large loss of information, because variation within the more sensitive measure is no longer visible in the aggregated data.

Disaggregating involves generating or estimating more sensitive measurements from data that are measured at a coarse scale. This process can be achieved by interpolating annual values between two known measurements taken (say) five years apart, or by extrapolating a trend to estimate new values past the end of existing measurements. Such approaches need to be conducted and interpreted with caution, because they result in estimated rather than actual data. Other more complex methods are also available to “fill-in” gaps in the data, which depend on the nature of the available data, and the size of the gap.

Once metrics are expressed at the same scale, they can be combined using a variety of mathematically-based weighting methods, which determine the relative contribution of each measure to the final summary measure. Details of such weighting methods are outside the scope of this Handbook.

Table 3: Prioritising metrics

| Prioritising metrics | |
|--|---|
| Criteria for inclusion: | Criteria for exclusion: |
| 1. A clear conceptual link between the measure and the goal of engagement, which can be described in simple terms. | 1. Similarity with other measures chosen to tap the same engagement goal in the same sector (multiple similar measures of engagement creates unnecessary redundancy). |
| 2. A measure that reflects an engagement process rather than an input or outcome (although other sorts of measure also have value). | 2. Similarity with other measures chosen to measure other aspects of engagement (overlap between the measures of two different constructs reduces the conceptual clarity and usefulness of both) |
| 3. Indirect evidence for the validity of the measure, based on a history of use in prior work on engagement in the network business. | 3. Data for the measures are available only at very broad geographic or temporal scale. A measure that is only available for the country as a whole, for example, has no value for identifying specific regional areas of concern within a particular network area. |
| 4. Direct evidence for validity of the measure, based on an empirical link with actual engagement outcomes. | 4. Data are available only in a measurement scale that allows misinterpretation or lack of clarity. Note that additional work may allow the data to be converted to a more useful scale. |
| 5. Substantial historical data are available and there is the expectation of continued collection of the data into the future. | 5. Extensive gaps in the data. A moderate degree of missing data can be resolved via various estimation techniques. However, a measure that is otherwise excellent is of little value (and may be misleading) if substantial areas or time periods are missing from the record. |

Examples of potential metrics

Baseline measures of customer opinion

There is considerable merit in energy network businesses conducting regular surveys of customers and stakeholders to monitor how they and their engagement with their customers are seen. This could be done at least annually, using either a telephone or an internet survey, by an independent organisation. Surveys should be designed to include a sample of people who regularly participate and a new sample of people for each survey. Serious efforts must be made to ensure the survey is as inclusive of all customer and stakeholder groups as possible.

These surveys should contain a standard set of metrics to allow trends in responses to be monitored. Supplementary questions can be included as needed.

Variables from the Social Licence to Operate framework, used to measure the effectiveness of customer engagement in the mining industry, provide a useful general set of metrics for monitoring how well energy network business decisions are accepted by their respective communities of customers and stakeholders over time. These scales have all been found to be reliable in previous research:⁴

1. Contact quantity
2. Contact quality
3. Procedural fairness
4. Trust
5. Acceptance

1. Contact quantity⁵

- a. How much contact have you had with people from <Company Name> in formal community meetings or events?
- b. How much contact have you had with people from <Company Name> informally in your local area?

- c. How much contact have you had with people from <Company Name> overall?

Participants are asked to respond on a 5-point scale (1 = none at all, 5 = a great deal). Scores from the three items are averaged, so that higher scores indicated more contact with the company.

2. Contact quality⁶

- a. Generally, how pleasant has been your contact with <Company Name>? (1 = very unpleasant, 5 = very pleasant)
- b. Generally, how positive has been your contact with <Company Name>? (1 = very negative, 5 = very positive)

Scores from the two items are averaged, so that higher scores indicate a high quality of contact with the company.

3. Procedural fairness⁷

Participants are asked to rate the extent to which they agree with each of three statements (1 = strongly disagree, 5 = strongly agree):

- a. People in their community have opportunities to participate in the decisions made by the <Company Name>.
- b. <Company Name> listens to and respects their opinions.
- c. <Company Name> is prepared to change its practices in response to community sentiment.

Scores are averaged across the three items, so that higher scores indicate higher perceived procedural fairness.

4. Trust⁸

Participants are asked to rate four statements, from 1 = *none at all* to 5 = *a great deal*.

- a. How much confidence do you have in <Company Name>?
- b. How much trust do you have in <Company Name>?

4 adapted from Moffat & Zhang (2014)

5 From Brown et al., 1999

6 From Brown et al., 1999

7 From Tyler, 2000

8 From Tam et al., 2009

- c. How much goodwill do you have toward <Company Name>?
- d. How much do you trust <Company Name> to act responsibly?

Scores on these four items are averaged, so that higher scores indicate greater levels of trust.

5. Acceptance⁹

Participants are asked to rate two items, from 1= *none at all* to 5 = *a great deal*.

- a. How much do you accept <Company Name> operating in your neighbourhood?
- b. How much do you approve of <Company Name> operating in your neighbourhood?

Scores on these two items are averaged, so that higher scores indicate greater levels of acceptance.

Measures for assessing overall engagement

The measures described in the previous section gather data from customers and stakeholders. Energy network businesses must also collect and monitor data about their own activities, as a kind of stock-take. The following points highlight some variables likely to be useful to all energy network businesses, but each energy network business may have others that will be relevant to their own purposes. The variables should be captured within a defined timeframe (e.g., a calendar year), and analysed for trends over time.

- » **Number of type of engagement activities conducted.** Reach of engagement activities across demographic and geographic boundaries should be recorded. Engagement activities should be categorised into the IAP2 framework (inform, consult, involve, collaborate, and empower) or another spectrum or decision matrix.
- » **Number and nature of complaints received through any channel.**
- » **Responsiveness** - Actions taken to address each complaint, and time taken for each action. This includes communications with complainants.
- » **The forms and frequency of feedback** to customers and stakeholders about the results of engagement activities.

- » **Total number of inquiries about engagement activities** received by telephone, email, in writing, or on company websites.
- » **Digital data analytics** e.g., number of visits to websites, unique and return; dwell time on pages; number and nature of comments on websites, and on other social media platforms, and replies to those comments.
- » **Number of participants and community organisations** attending engagement activities (relative to total number invited).
- » **Internal engagement with process** - Presentations of results from engagement activities to internal decision making groups.
- » **Internal response to engagement** - Actions taken as a result of, or informed by, the results of engagement activities.

Measures for specific engagement activities

Individual engagement activities, such as for regulatory processes, should be evaluated using a consistent set of questions across activities to allow for comparison.

A set of possible questions that could be used for such evaluations is listed below. Responses could be on a 5-point scale, anchored appropriately for each question:

- » Was this engagement activity worthwhile?
- » Were you satisfied with the engagement process?
- » Did you feel your views and contributions were accepted?
- » Do you think the company will act on the outcomes of this engagement process?
- » Was the engagement process open and transparent?
- » Do you think the appropriate people have been included in this engagement process?

To reiterate the key point here, it is vital that metrics are first developed, consistently used, and repeatedly assessed and adjusted with reference to the overall goals of engagement. This approach ensures that metrics provide the best value to the business in helping track and improve engagement outcomes.

9 From Moffat & Zhang, 2014

CASE STUDY 5

Background

Following changes to the electricity rules, Business A is required to submit a Tariff Structure Statement (TSS) every five years. The current (and inaugural) TSS is for the period 2017-2020.

The rules for the development of network pricing systems (tariffs) have changed. While tariff reform will not increase the amount of revenue collected, it will change the way revenues are collected. Business A is committed to the adoption of cost reflective tariffs and has been gradually introducing tariff reforms for larger customers since the turn of the century. In the local state, costs are dominated by the infrastructure capacity required to cater for the hottest days in summer and cost reflective tariffs are intended to signal these costs to customers. This approach will target customers' 'peak demand' usage which should reduce the need to upgrade the network in the future.

Business A is currently undertaking an engagement program with stakeholders and customers on the TSS to help them understand cost reflective tariff structure options, contribute to the proposed changes, and help consumers understand the impacts of these changes. Business A lodged its initial TSS with the AER in December 2015. Prior to lodging the initial 2017-2020 TSS, the business undertook six months of engagement with stakeholders and customers. The TSS proposed a range of demand based tariffs for smaller customers and an implementation timeframe for the 2017-2020 period and beyond.

To build on the initial TSS, Business A committed to running a deliberative process with a broad cross-section of the community to refine a set of Customer Impact Principles that can be applied when making decisions around tariff design and implementation. Deliberative engagement is a relatively new process that involves customers and stakeholders actively engaging in a process aimed at developing shared solutions or outcomes. The business had used similar approaches in support of the 2015 revenue determination and the TSS engagement incorporated several enhancements to suit the nature of the problem at hand.

The draft principles submitted as part of the initial TSS acted as an input to this process. The refined principles developed as a result of this process will be submitted to the AER as part of the Revised TSS in September 2016.

Engagement approach

Electricity Advisory Panel

An Electricity Advisory Panel was established to develop the Customer Impact Principles. An independent consultant was engaged to set up the Panel and run the deliberative process. The Panel was recruited from a customer database and randomly selected to ensure that the final twenty customers broadly represented the state population in terms of gender, age group, quarterly electricity bill, location and employment.

The Panel also included twelve key representative stakeholders from the business sector, consumer advocacy groups, non-government organisations representing vulnerable communities, State Government representatives, and primary producers. Many of these stakeholders had already been working with the business on the development of the initial 2017-2020 TSS and so have a good understanding of the TSS and the business.

Engagement brief

The Advisory Panel was given the following brief:

- » The business believes that customer impacts should be considered alongside economic impacts of setting tariffs.
- » The mechanism they have chosen for doing this is through the application/use of Customer Impact Principles.
- » The Customer Impact Principles will complement existing Pricing Principles that the business works with that have an economic focus, and will be designed to ensure that customer impacts are given a similar focus.
- » These Principles (if approved by the Regulator as part of the broader Tariff Structure Statement) will be used by the business as a 'checklist', against which it will assess its proposed tariffs and associated policies.
- » They will assist the business in considering customer impacts in order to determine the most appropriate course of action when setting tariffs.
- » The Electricity Advisory Panel is being given the role of developing the Customer Impact Principles.
- » The Principles developed by the Panel will be provided to the Regulator as part of the final Tariff Structure Statement, to be submitted in September 2016.

Deliberative workshops

The deliberative process involved four workshops with customers, community and stakeholders. These included:

- » **Workshop 1** - Background information for customer and community members (customer and community only workshop).
- » **Workshop 2** - Background briefing session for stakeholders (stakeholder only workshop).
- » **Workshop 3** - First deliberative session with both customer and community members and stakeholders. The aim of this session was to develop a draft set of principles. The draft principles were then reviewed by a number of 'critical friends' (refer section below).

- » **Workshop 4** - Second deliberative session with both customer and community members and stakeholders. In this session the principles were further refined and presented to key internal business staff.

Following completion of the four workshops, a draft report was developed by the engagement facilitators and a writing group comprised of volunteer Advisory Panel members was established to review and finalise the report. A final report was subsequently endorsed by this group and provided to the business.

Critical friends

A number of key stakeholders who could not be involved in the deliberative process acted as critical friends to the Electricity Advisory Panel. The critical friends provided input after workshop 3, following the development of the draft Customer Impact Principles. This feedback was provided to the Electricity Advisory Panel in workshop 4 and was used to further refine and finalise the principles.

Outcomes

The Electricity Advisory Panel was posed the following question: 'when Business A make decisions about network charges, what are the impacts on customers Business A needs to consider'?

The Panel developed a set of Customer Impact Principles, which will complement the existing Pricing Principles, and have been designed to ensure that customer impacts are given a similar focus to economic considerations when establishing and determining tariffs.

The Principles will be used by the business as guidance or a 'checklist', against which it will assess its proposed tariffs and associated policies. They will assist us in ensuring customer impacts are factored into decision making processes related to tariff setting, in order to determine the most appropriate course of action.

The Principles developed are:

- » **Principle 1, Empower the consumer** - This Principle aims to ensure that the business makes decisions about network tariff setting that empower the consumer. This is based on the premise that the consumer should be allowed to see, understand and manage their own behaviour.
- » **Principle 2, Fairness and equity** - This Principle requires the system to recognise the diversity of consumers and that some households and businesses are particularly vulnerable to sudden changes. Education, sufficient lead-in times and the provision of complementary measures are seen as having key roles.
- » **Principle 3, Simplicity (to inform decision making)** - Tariffs have to be understandable if people are going to respond to them. To be understandable, the Panel felt they needed to be simple and transparent. For consumers, this is important because if tariffs are understood, people will be able to make better decisions about their behaviour (usage) and their investments (for home or business).

Key engagement learnings

The deliberative process provided a number of key benefits to the network business. The process:

- » Built understanding in the community of the trade-offs involved in different approaches to distributing costs between the various types of consumers and provided a way forward that is balanced and reasonable.
- » Played a role in building a more positive stakeholder profile and countering negative public perceptions.
- » Provided new ideas, innovations and new approaches to solving the problem and developing options.

Feedback from the Electricity Advisory Panel was overwhelmingly positive and as a result the business has developed some positive community sentiment through the process.

From an internal business perspective, it was the first time the deliberative approach, in this format, has been used in an engagement program and it was found to be valuable and rewarding in terms of delivering a balanced set of Customer Impact Principles. The Principles will help Business A consider customer impacts in setting tariffs. The business has committed to their use as a checklist when finalising its TSS. The deliberative process also provided some valuable insights into customer attitudes and perceptions.

RESOURCE MATERIALS

General engagement references and resources

- AA1000 Stakeholder Engagement Standard www.accountability.org/standards/aa1000ses.html
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APPENDIX A:

Energy networks' regulatory environment

The AER regulates energy networks and markets under relevant legislation and rules. This includes determining what energy networks can charge for using their services, and the approval of scoped pricing proposals.

The AER is obliged to ensure their decisions promote the long term interests of energy customers. In pursuing this interest, energy network businesses must articulate how they have engaged with their consumers and how they have sought to address any concerns identified through that engagement.

As part of their five-yearly assessment of energy network businesses revenue proposals the AER considers (among other factors) the extent and quality of **consumer engagement undertaken**. Further, the AER looks for evidence that regulatory proposals **reflect the outcomes** of the engagement that has been undertaken by network businesses.

As part of the Better Regulation Reform Program, the AER released its Consumer Engagement Guideline for Network Service Providers in 2013. The guideline provides principles and a framework for energy network service providers to engage with their consumers.

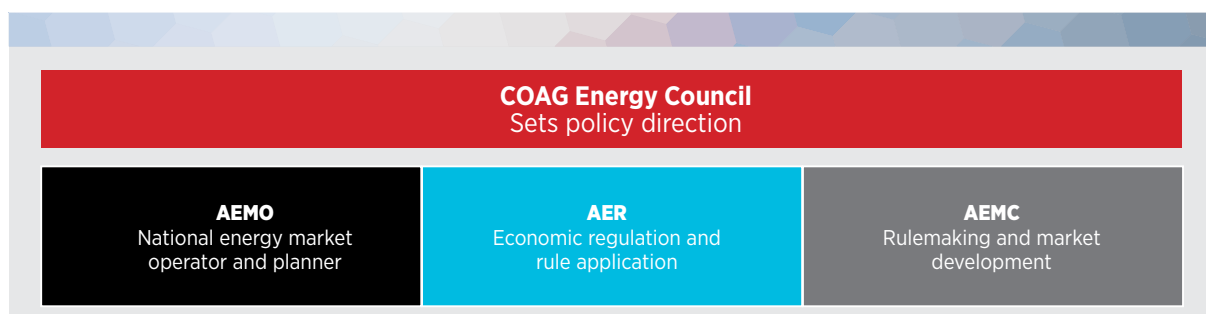
The guideline aims to help energy network service providers develop consumer engagement strategies and approaches to apply across their business, and also to help them prepare spending proposals that reflect consumers' long term interests.¹⁰

The guideline identifies a set of best practice principles to guide effective engagement with consumers. These overarch four components that the AER considers to constitute a robust approach to consumer engagement.

The four principles expected to characterise company interactions with consumers are:

- 1. Clear, accurate, and timely communication** – 'provide information to consumers that is clear, accurate, relevant, and timely, recognising the different communication needs and wants of consumers' (p. 7).
- 2. Accessible and inclusive** – 'recognise, understand, and involve consumers on an ongoing basis; not just at the time an expenditure proposal is being prepared' (p. 8).
- 3. Transparent** – 'clearly identify and explain the role of consumers in the engagement process, and consult with consumers on information and feedback processes' (p. 9).
- 4. Measureable** – 'measure the success, or otherwise, of their engagement activities' (p. 9).

Figure A1: Policy and Regulatory Environment



¹⁰ Australian Energy Regulator (2013). *Better regulation: Consumer engagement guideline for network service providers*. Canberra: Commonwealth of Australia.

The four components that the guidelines are structured around to guide service providers in developing new or improved consumer engagement strategies and processes are:

- » **Priorities** – service providers are expected to identify consumer cohorts and their relevant views, outline their engagement objectives, and discuss how to achieve those objectives.
- » **Delivery** – service providers are expected to address priorities through ‘robust and thorough’ consumer engagement.
- » **Results** – service providers are expected to articulate the outcomes from their engagement processes and how success has been measured.
- » **Evaluation and review** – service providers are expected to evaluate and review the effectiveness of their engagement processes. The AER expects ‘all network service providers – gas and electricity, transmission and distribution – to use the guideline to enhance their consumer engagement activities’ (p. 12). Consumer engagement is explicitly ‘a factor in how we assess expenditure proposals’ (p. 12).

The AER consumer engagement guideline refers to the ‘public participation spectrum’ identified by the International Association for Public Participation (IAP2). This spectrum identifies five different levels of community engagement in any program: ranging from *inform, which is a one-directional communication flow providing the public with information, to empower, which hands over final decision making to the public. Levels in between (consult, involve, and collaborate) range in increasing public participation and engagement in decision making.*

*The AER consumer engagement guideline clearly expects service providers to construct their consumer engagement activities to fall somewhere between *inform and empower*. We note that the IAP2 approach is not the only method of delineating different engagement methods: other frameworks exist and may prove useful as a means of understanding the level of engagement that can potentially be adopted.*

APPENDIX B:

Australia's energy networks

Australian energy networks provide an energy transport service and operate as monopoly businesses regulated by the Australian Energy Regulator (AER) and the Australian Energy Market Commission (AEMC). Networks play a critical role in serving the energy needs of almost all Australians.

The Australian electricity system was originally based on independent, self-supporting state systems. The National Electricity Market was then developed in the 1990s, and connects all states and territories except Northern Territory and Western Australia

Electricity networks facilitate the supply of energy to almost every household and business in Australia through over 900,000 kilometers of transmission and distribution lines.

Electricity transmission networks transport power over long distances, linking large generators with load centres. Distribution networks transport electricity from points along the transmission network and through urban and regional areas to provide electricity to consumers.

The domestic natural gas network sector operates and manages over 88,000 kilometers of distribution pipelines, providing energy to over 4.3 million households and 130,000 businesses. The gas produced for domestic use is transported by high pressure transmission pipelines from the production facility to the distribution network or to large users. Gas entering the distribution system is then transported under lower pressures to consumers. Retailers arrange with gas distribution network operators for the supply of gas to customers via the distribution network.

Electricity Networks

Actew AGL
Ausgrid
Ausnet Services
CitiPower
Powercor
ElectraNet
Endeavour Energy
Energex
Ergon Energy
Essential Energy
Horizon Power
Jemena
Power and Water
Powerlink QLD
SA Power Networks
TasNetworks
Transgrid
United Energy
Western Power

Gas Networks

Actew AGL
AusNet Services
Australian Gas Networks Ltd
Atco Gas Australia
Jemena
Multinet Gas
TasGas Networks

APPENDIX C:

List of stakeholder organisations contacted during Handbook development

ACOSS
ACTCOSS
Alternative Technology Association
Anglicare
Australian Chamber of Commerce & Industry
Australian Energy Regulator
Australian Industry Group
Australian Local Government Association
Brotherhood of St Laurence
Business Council of Australia
Business SA
Commonwealth Association of Legislative Counsel
Canegrowers
Centacare
Choice
Clean Energy Council
Colony 47
Consumers SA
COTA
COTA QLD
COTA TAS
COTA SA
Consumer Utilities Advocacy Centre
DCSI Affordable Living Programs
Department of Economic Development, Jobs, Transport and Resources
Department of Industry and Science
Department of State Development
Department of State Growth
DEWS
Economic Regulator
Energy and Water Ombudsman
Energy and Water Ombudsman SA
Energy and Water Ombudsman Victoria
Energy Consumers Australia
Energy Consumers Coalition of South Australia
Energy Ombudsman
Energy Users Association of Australia
Energy Retailers Association of Australia
Essential Services Commission
Ethnic Communities Council of Victoria
Ethnic Communities Council of NSW
Energy and Water Ombudsman NSW
Good Shepherd
Local Government Association of QLD
Local Government Association SA
Migrant Resource Centre
Multicultural Communities Council SA
NCOSS
NSW Aboriginal Lands Council
NSW Business Chamber
NSW Farmers
NSW Local Government Association
Office of the Tasmanian Economic Regulator
Primary Producers SA
Property Council of Australia
Property Council SA
Public Interest Advocacy Centre
QCOSS
Queensland Farmers Federation
QLD Chamber of Commerce and Industry
QLD Resources Council
QLD Consumers Association
SA Chamber of Mines and Energy
SACOSS
Salvation Army
South Australian Wine Industry Association
St Vincent De Paul
TasCOSS
Tasmanian Farmers and Graziers Association
The Energy Project
Total Environment Centre
Trade and Investment NSW
Urban Development Institute of Australia QLD
Uniting Care Australia
Uniting Care South Australia
VCOSS

ELECTRICITY NETWORK
TRANSFORMATION ROADMAP

