

**Shipper Survey
Analysis Report**

October 2009

Survey conducted March – May 2009

INTRODUCTION

National Grid is committed to providing excellent service to its customers. The Shipper Customer Satisfaction Survey is conducted annually and provides our customers with an opportunity for direct feedback on their experiences with our business. The feedback we receive helps us to focus our attention on the areas that are important to our customers.

Following on from the completion of the survey, each of the relevant business areas within National Grid have worked to develop action plans to address the issues raised. Where individual Shippers have experienced one off or uncommon issue these are addressed directly on a one to one basis.

The 9 National Grid business areas that customers were asked to provide feedback on were:

- ◆ Fulcrum - Connections (Regulated)
- ◆ National Grid - Domestic Connections
- ◆ National Grid - Disconnections
- ◆ National Grid - Customer Strategy (Account Management) Services
- ◆ National Grid - Pricing
- ◆ National Grid - Miscellaneous billing/Credit and risk (Order to Cash)
- ◆ National Grid - Regulation Team
- ◆ National Grid - Network Strategy
- ◆ National Grid - Contact Centre

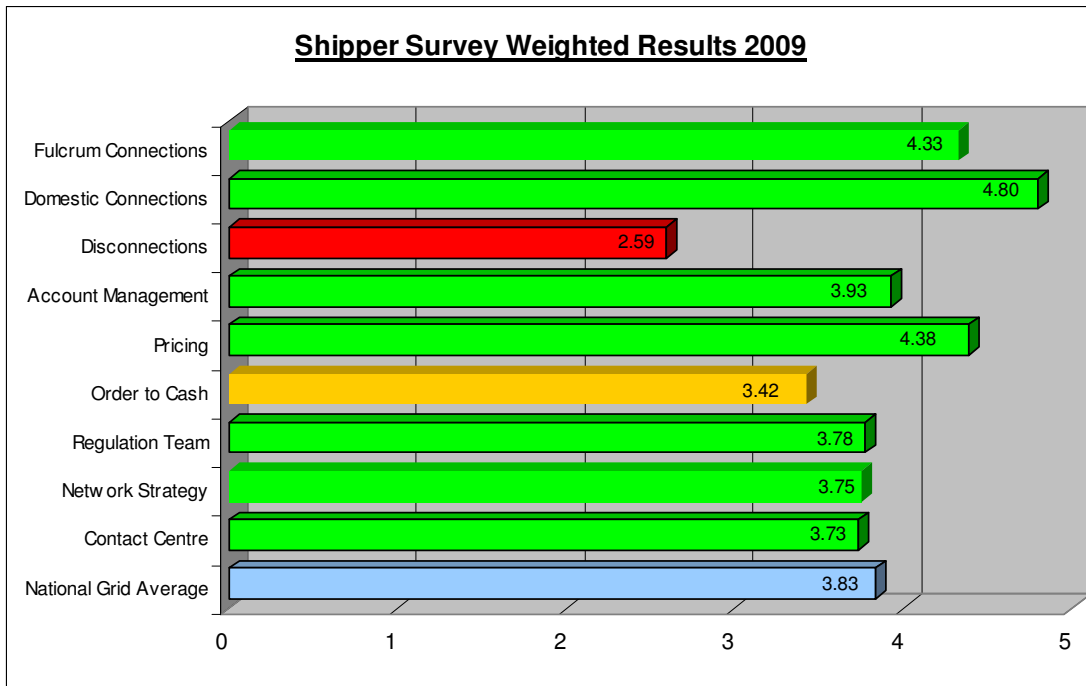
This year we invited responses from the 14 organisations that had previously taken part in the survey. Responses have been received from 8 of these organisations. 4 of the surveys were conducted face to face with the balance being conducted via email.

The following Shippers participated in this year's survey:

Shipper	2009	2008	2007	2006
British Gas	✓	✓	✓	✓
EDF Energy	✓	✓	✓	✓
E.ON	✓	✓	✓	✓
GDF Suez	✓	✓	✓	✓
Gazprom		✓	✓	✓
Npower	✓	✓	✓	✓
Regent Gas		✓	✓	✓
Corona	✓	✓	✓	
SSE	✓	✓	✓	✓
ENI		✓		
Statoil	✓	✓	✓	✓
Shell Gas Direct			✓	✓
Scottish Power				✓
Total Gas & Power				✓

The following report presents Shipper feedback on an anonymous basis and details action plans which have been developed by the various business areas to address specific areas of Shipper concern.

EXECUTIVE SUMMARY



Key to Satisfaction Scores

1	Very Dissatisfied	Unhappy with the service being received
2	Dissatisfied	Unhappy with specific aspects of the service received
	Neither	
3	Dissatisfied/Nor Satisfied	Generally happy with service with minor comments on standard of service
4	Satisfied	Happy with service received
5	Very Satisfied	Happy with service and exceeding customer expectations

The overall weighted satisfaction for shippers surveyed was **3.8**. There were common areas of frustration across the Disconnections process and these were in respect of general communication around the process.

The previous weighted overall survey score in 2008 was **3.8**. During this survey, the same business units were surveyed across 11 Shippers.

All shipper scores and comments within this report are reflective of all shippers' views, and provides a representative picture of shipper feedback.

The above weighted results have been balanced so that the score given by each shipper is balanced against their actual use of the service, and actual number of customer interactions with National Grid business units.

Regardless of how often our customers use our services all views are important so that we can improve the service we offer.

**FULCRUM CONNECTIONS
ACTING AS NATIONAL GRID GAS SERVICE PROVIDER**

SUMMARY RESULTS

5 of the 8 shippers responded to the Shipper Survey in respect of Fulcrum's Connections activities. The average weighted score across the 5 questions was **4.3**. (Weighted 2008 score 3.4).

Positive feed back was received on the service provided by Fulcrum with all respondents scoring 3 or above across all areas.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none"> • Average weighted score across 5 respondents: 3.8
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none"> • Average weighted score across 5 respondents: 4.5
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none"> • Average weighted score across 5 respondents: 4.5
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none"> • Average weighted score across 5 respondents: 4.6
How good are we at keeping you informed?	<ul style="list-style-type: none"> • Average weighted score across 5 respondents: 4.3

ISSUES RAISED

Positive feedback was received on the service provided by Fulcrum. A concern was expressed regarding the migration of I&C non standard connections service to National Grid and potential loss of knowledge.

ACTIONS

Knowledge sharing has been managed through the Connections Alignment Project (CAP) to ensure processes and Standards of Services were transferred over at a high level. In addition to this, the teams have also created lower level processes to manage the day to day activities.

Fulcrum and Distribution Customer Support* Commercial fully supported these lower level processes and provided the necessary support to the teams to ensure knowledge transfer. This included training packages and Q&A sessions, which were rolled out across all impacted departments.

Pre and post go live Fulcrum staff provided on site support to National Grid staff to ensure consistency of service levels to our customers.

* Distribution Customer Support has recently been renamed to Customer Services recognising the increased focus in our aim to providing excellent customer service.

DOMESTIC CONNECTIONS

SUMMARY RESULTS

1 of the 8 shippers responded to the satisfaction survey in respect of Domestic Connections activities. The average weighted score across the 5 questions is **4.8** (Weighted score 2008 4.7).

The levels of satisfaction generally ranged from 'satisfied' to 'very satisfied'.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 1 respondent: 4.0
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 1 respondent: 5.0
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 1 respondent: 5.0
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 1 respondent: 5.0
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 1 respondent: 5.0

ISSUES RAISED

Positive comment was received regarding the service delivered by the team. The only issue raised related back to Site Works Terms and Conditions.

ACTIONS

National Grid Gas is keen to promote competition in connections. Organisation in competition with National Grids' connection activity tend to be small in size and funding credit terms can be a major issue for them entering the market.

The approach by National Grid Gas to remove the credit facility allows third parties to either offer a credit facility or allows them to compete on the same commercial terms with National Grid Gas. Currently, due to the economic climate, this is even more relevant for these connections organisations who are often much smaller than Suppliers, Shippers and Gas Transporters.

Further, many customer are not eligible for credit from Suppliers for such works and removing the credit facility ensure that the money moves through the gas industry to those providing the services rather than remaining with the larger transporters and / or supplier organisations.

DISCONNECTIONS

SUMMARY RESULTS

4 of the 8 shippers responded to the satisfaction survey in respect of Disconnections activities. The average weighted score across the 5 questions is **2.6**. (Weighted score 2008 3.3).

The levels of satisfaction were varied, with 'satisfied' and 'very dissatisfied' being used by the respondents. The lowest average score (1.1) reflected on 'How good are we at keeping you informed', where 2 of the 4 Shippers marked 'very dissatisfied'. The highest average score (3.6), related to the 'Professionalism and willingness of staff to take ownership of issues'; here 2 of the 4 Shippers marked 'neither dissatisfied' or 'satisfied' or above.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 4 respondents: 2.7
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 4 respondents: 2.7
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 4 respondents: 3.6
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 4 respondents: 2.9
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 4 respondents: 1.1

ISSUES RAISED

A number of concerns were raised regarding general communication. These comments ranged from a lack of reference numbers on paperwork, to concerns over direct contact numbers for the quotations and planning department.

ACTIONS

Many of the issues raised focus on our communication with our customers. Given the feedback we have received from this survey, a review of our current processes and our wider communication strategy is under review.

Our current Enquiry process enables all calls to be received via our Contact Centre, with the person who takes the call taking ownership of the enquiry, and where possible resolving the query on first contact. There will always be occasions where the call will need to be logged via our enquiry process and handled within our SLA (Service Level Agreement), however, as part of the review of our process, quality monitoring of call handlers will be undertaken on a weekly basis.

STRATEGIC RELATIONSHIP MANAGEMENT

SUMMARY RESULTS

6 of the 8 shippers responded to the satisfaction survey in respect of Strategic Relationship Management activities. The average weighted score across the 5 questions is **3.9**. (Weighted score 2008 4.3).

The lowest average score (3.1) related to; 'How good we are at keeping you informed'. The scores ranged widely with 1 respondent marking 'dissatisfied', and 2 respondents marking 'satisfied' or higher. With the highest average scores (4.4) reflecting 'Accessibility to appropriate contacts and the professionalism of staff'.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 6 respondents: 3.6
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 6 respondents: 4.4
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 6 respondents: 4.4
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 6 respondents: 4.0
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 6 respondents: 3.1

ISSUES RAISED

Positive feedback was received for the team, in particular with respect to query resolution; however, Shippers see the value in building on this to receive a more proactive account management service.

ACTIONS

Our aim is to provide excellent customer service to all our customers. We have recently undertaken a review of our communications strategy and aim to deliver the first of those initiatives in the coming weeks. As part of this review we are looking to review our web page [National Grid: Shipper Information](#) to provide additional useful information. The National Grid website as a whole is due to be updated this coming year, and we will also seek feedback as this develops.

Working closely with the Regulation team will improve our understanding of some of the challenges that our customers face which in turn will assist the team to deliver a more proactive service.

PRICING

SUMMARY RESULTS

7 of the 8 shippers responded to the satisfaction survey in respect of Distribution transportation pricing activities. The average weighted score across the 5 questions is **4.4**. (Weighted score 2008 4.3)

Scores for this activity were generally high. The lowest average score (3.9) was associated 'How good we are at keeping you informed' with 2 out of 7 Shippers scoring 'not satisfied/nor dissatisfied' with other respondents scoring 'satisfied' or higher. The highest average score (4.7) reflected the opinion on the 'Knowledge and ability of staff to resolve queries' where all respondents raised marked either 'satisfied' or 'very satisfied'.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 7 respondents: 4.7
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 7 respondents: 4.1
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 7 respondents: 4.5
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 7 respondents: 4.7
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 7 respondents: 3.9

ISSUES RAISED

Positive comments were received for this team. A comment was passed on the complexity of communication that is issued by the team on occasion. Concern was also expressed over difficulties in navigating the external website in order to find pricing information.

ACTIONS

The Pricing team endeavour to hold at least one meeting focused on pricing with each active shipper in the coming year. DCMF (Distribution Charging Methodology Forum) and more frequent shipper meetings will continue where requested. National Grid will seek to highlight future issues and uncertainties at the DCMF meetings when discussing Mod 186 information and also at 1-1 shipper meetings.

The Pricing Team will review the explanations of the changes to charges to improve their readability. Further discussions will be held with the shipper community to discuss how notices, and similar communications, can be better communicated.

The National Grid website as a whole is due to be updated this coming year. As part of this we will aim to improve navigation to pricing information.

ORDER TO CASH

SUMMARY RESULTS

6 of the 8 shippers responded to the satisfaction survey in respect of Order to Cash activities. The average weighted score across the 5 questions is **3.4** (Weighted score 2008 3.8).

The highest average score was (4.3) which related to 'Accessibility to the appropriate contracts' with all Shippers marking 'neither dissatisfied/nor satisfied' or 'satisfied' or above. The lowest score average scores (3.2) reflecting on 'Impression of overall service provided', 'Professionalism and willingness of staff to take ownership of issues' and 'Knowledge and ability of staff to resolve queries'.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 6 respondents: 3.2
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 6 respondents: 4.3
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 6 respondents: 3.2
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 6 respondents: 3.2
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 6 respondents: 3.3

ISSUES RAISED

In general, positive feedback was offered for this area of the business. A few comments regarding the length of time taken to resolve issues were noted. Comment was expressed in relation to providing updates of changes in the team and structure.

ACTIONS

Our aim is to provide a top quality service to all our customers and to assist this process we will circulate our structure giving key contacts and escalation routes.

Order to Cash has a planned performance level to resolve 95% of all queries within D+10. This is continuously measured via the monthly scorecard which is circulated across National Grid.

Order to Cash performance has exceeded this measure month on month, often hitting 100%. Further system and process enhancements have also been introduced this year that should further enhance the customer experience.

REGULATION TEAM

SUMMARY RESULTS

6 of the 8 shippers responded to the satisfaction survey in respect of the Regulation team. The average score across the 5 questions is **3.6**. (Weighted score 2008 4.1).

The lowest score (2.6) related to 'How good we are at keeping you informed' where two of the respondents indicated their dissatisfaction. The highest score (4.5) reflected the respondents 'Ability to access the appropriate staff' and the 'Knowledge and ability of staff to resolve queries'.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 6 respondents: 3.3
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 5 respondents: 4.5
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 5 respondents: 3.3
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 5 respondents: 4.5
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 4 respondents: 2.6

ISSUES RAISED

Positive comments were received regarding the knowledge, professionalism and helpfulness of the team. However, concern was raised regarding the focus of the team.

ACTIONS

Our Regulation Team has now joined forces with the Strategy Relationship Team in order to deliver a more focused service that we believe will benefit National Grid and our customers.

The combination of industry knowledge and experience within the wider team, will offer a new dimension to the service that is provided both in terms of our strategy and vision on industry issues whilst seeking to meet the needs of our customers. We welcome feedback on an adhoc or ongoing basis which will help us monitor improvements in this area.

NETWORK STRATEGY

SUMMARY RESULTS

3 of the 8 shippers responded to the satisfaction survey in respect of Network Strategy activities. The average score across the 5 questions is **3.6**. (Weighted score 2008 2.8).

The levels of satisfaction were good, with the highest average scores (4.6) associated with the 'Knowledge and ability of staff to resolve queries'. The lowest score (2.7) related to 'How good we are at keeping you informed' where all respondents scored 'satisfied'.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 3 respondents: 3.3
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 3 respondents: 4.1
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 3 respondents: 3.0
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 3 respondents: 4.6
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 2 respondents: 2.7

ISSUES RAISED

The service received was positive. More clarity of structure (i.e. names and escalation routes) has been requested so that Shippers know who to contact.

ACTIONS

The Core Contract Directory that is published on the National Grid shipper web page provides contact details for process owners within Network Strategy. The Core Contact Directory can be found by clicking on the following link: [National Grid: Shipper Information](#) and is updated at regular intervals.

CONTACT CENTRE

SUMMARY RESULTS

3 of the 8 shippers responded to the satisfaction survey in respect of the Contact Centre. The average score across the 5 questions is **3.6**. (Weighted score 2008 4.0).

The levels of satisfaction were generally good, with the highest average score (4.6) associated with the 'Knowledge and ability of staff to resolve queries'. The lowest score (2.7) relating to 'How good we are at keeping you informed.

SCORES

Area	Shipper Scores
What is your impression on the overall level of service provided?	<ul style="list-style-type: none">Average score across 3 respondents: 3.3
How did you find accessibility to the appropriate contacts?	<ul style="list-style-type: none">Average score across 3 respondents: 4.1
What is your opinion on the professionalism and willingness of staff to take ownership of issues?	<ul style="list-style-type: none">Average score across 3 respondents: 3.0
What is your opinion on the knowledge and ability of staff to resolve queries?	<ul style="list-style-type: none">Average score across 3 respondents: 4.6
How good are we at keeping you informed?	<ul style="list-style-type: none">Average score across 2 respondents: 2.7

ISSUES RAISED

Overall feedback was positive; however concern was raised regarding inconsistencies in staff knowledge and call handling on occasion.

ACTIONS

We have a one team approach to training across our 2 Contact Centres, a dedicated team of administrators and trainers are lead by a single Team Leader and manager. Staff cross flex between Contact Centres to ensure a consistent approach. Behavioural and technical training are combined within our new starter training package, both of which are evaluated and monitored through our newly launched quality monitoring process.

We have also recently reviewed the process for issuing policy and procedural briefs to staff; a new team of coaches will be available to deliver the briefs ensuring competence prior to sign off of the material.

Thank you for taking the time to participate in the 2009 Shipper Survey. Your continued feedback is important to us for improving the services that we provide to you.

An update of our progress against our action plans will be published early in 2010.

In addition, we are reviewing the survey for 2010 to ensure that it still captures and monitors the services that our customers' value. We welcome your feedback on areas that you may like to see in future surveys.

Once again, thank you for your support. In the meantime, please do not hesitate to contact me if you would like to discuss any aspect of our service.

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