



Board Action

BOARD OF DIRECTORS

April 19, 2022

ITEM

SD-5: Customer Satisfaction Monitoring Report

PURPOSE

To ensure full board review, discussion and acceptance of the SD-5: Customer Satisfaction Monitoring Report

FACTS

- a. The first set of Board policies, including SD-5: Customer Satisfaction, was approved by the Board on July 16, 2015.
- b. Each policy was evaluated and assigned to the appropriate Board Committee for oversight of the monitoring process, and revised as needed. SD-5 was amended by the Board on November 16, 2017.
- c. The Public Information Committee is responsible for evaluating Board Policy SD-5: Customer Satisfaction.
- d. The Public Information Committee has reviewed and accepted the SD-5: Customer Satisfaction Monitoring Report as outlined on Exhibit A, and is recommending that OPPD be found to be sufficiently in compliance with the policy as stated.

ACTION

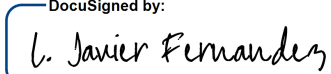
The Public Information Committee recommends Board approval of the SD-5: Customer Satisfaction Monitoring Report.

RECOMMENDED:

DocuSigned by:

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Tim D. McAreavey
Vice President – Customer Service

APPROVED FOR BOARD CONSIDERATION:

DocuSigned by:

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L. Javier Fernandez
President and Chief Executive Officer

TM:rih

Attachments: Exhibit A – Monitoring Report
Resolution



Exhibit A

Monitoring Report SD-5: Customer Satisfaction

Public Information Committee Report April 19, 2022

Tim McAreavey, Vice President Customer Service
Steve Fanslau, Director, Customer Service Government Infrastructure

SD-5: CUSTOMER SATISFACTION

Achieving a high level of customer satisfaction is key to OPPD's vision.

The Board will ensure that OPPD shall obtain feedback from its customer-owners through nationally syndicated studies, which allow OPPD to evaluate and prioritize its strategic plans, and to guide investments and operational activities to ensure high satisfaction in all aspects of OPPD's interactions with our customer-owners.

OPPD establishes a goal to achieve top quartile performance in customer satisfaction for similar-sized utilities in the region across customer classes.

AS A PART OF THIS POLICY:

- Interact with customer-owners in a respectful, dignified and civilized manner.
- Communicate a procedure to customers who believe they have not received fair treatment from OPPD.
- Provide periodic customer-owner trend updates to the Board.

SD-5 ACCOUNTABILITIES

Aligned with OPPD's core values, we are committed to the following actions as part of this policy:

- 1) Regularly obtain feedback from customer-owners
- 2) Measure customer satisfaction
- 3) Use the voice of customer (VOC) to prioritize investments and operational activities
- 4) Interact with customer-owners in a respectful, dignified manner
- 5) Provide ways for customer-owners to indicate if they believe they have not received fair treatment
- 6) Provide periodic customer-owner trend updates to the Board

SD-5 ACCOUNTABILITIES

1) Regularly obtain feedback from customer-owners

SYNDICATED CUSTOMER SATISFACTION STUDIES

Provides national satisfaction benchmark data on a wide range of electric service attributes

OPPD ONLINE POWER PANEL AND ONLINE CHAT

Allows OPPD to get rapid feedback on pertinent issues that is projectable to the customer base

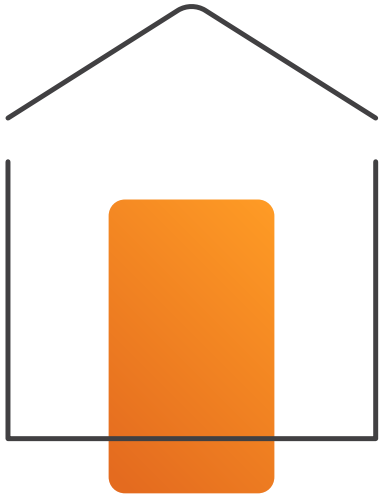
TRANSACTIONAL AND JOURNEY SURVEYS

Provides rapid feedback on service interactions

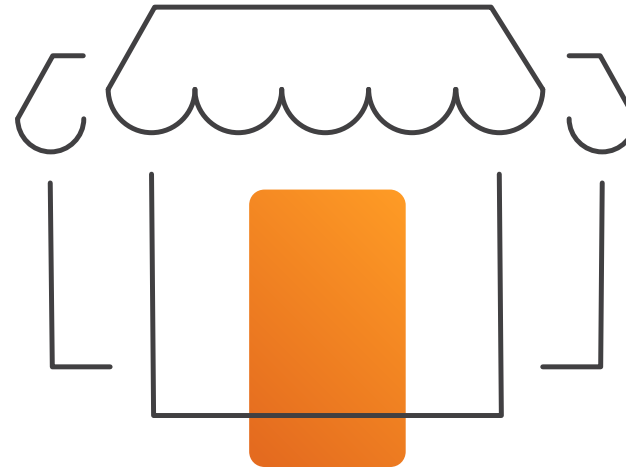
FOCUS GROUPS & EMPATHY INTERVIEWS

Allows in-depth exploration to gain a broader understanding of customer perceptions

2) Measure customer satisfaction



RESIDENTIAL
customer
satisfaction
measured via J.D.
Power syndicated
study



**COMMERCIAL &
INDUSTRIAL**
customer
satisfaction
measured via
Escalent's Cogent
syndicated study



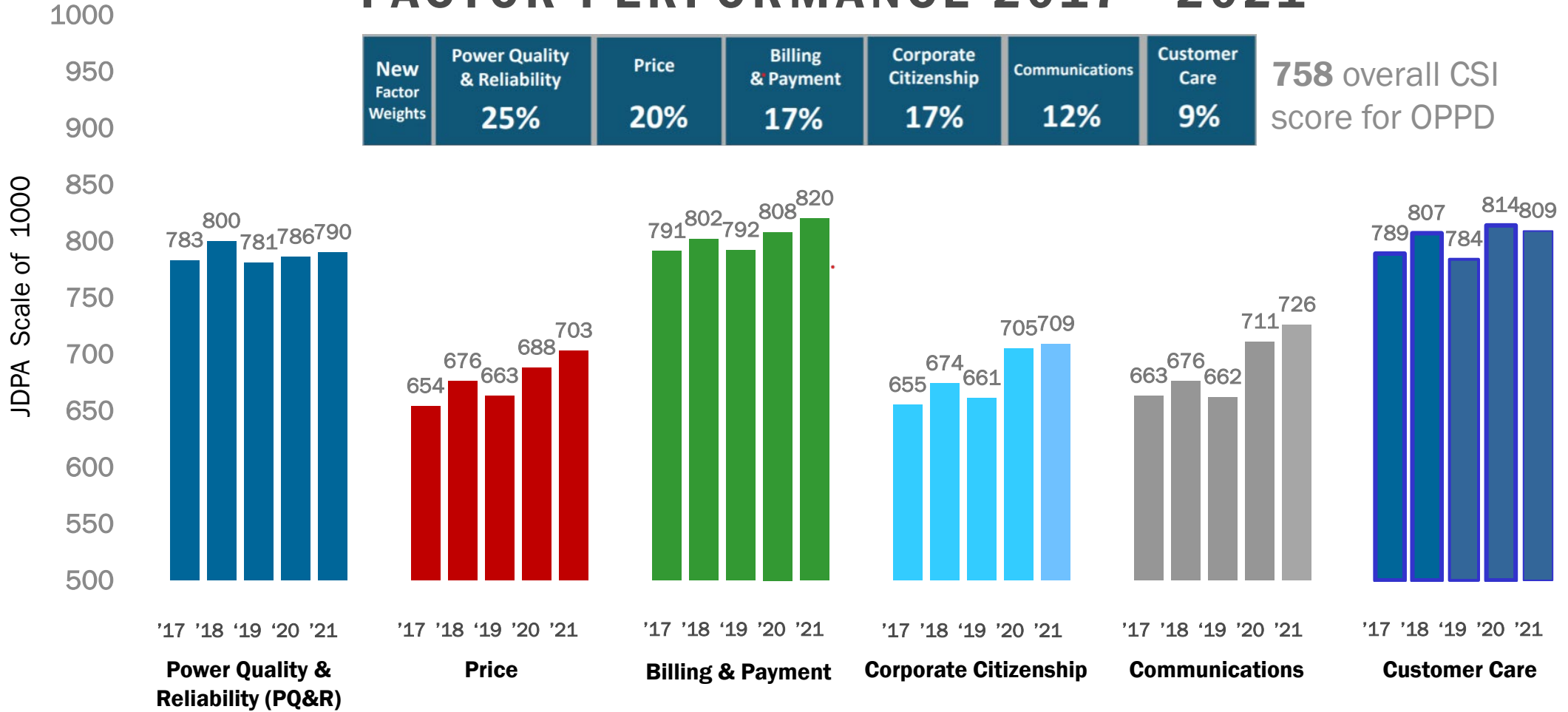
2021 Residential Customer Satisfaction

2) Measure customer satisfaction

FACTOR PERFORMANCE 2017 – 2021

758 overall CSI score for OPPD

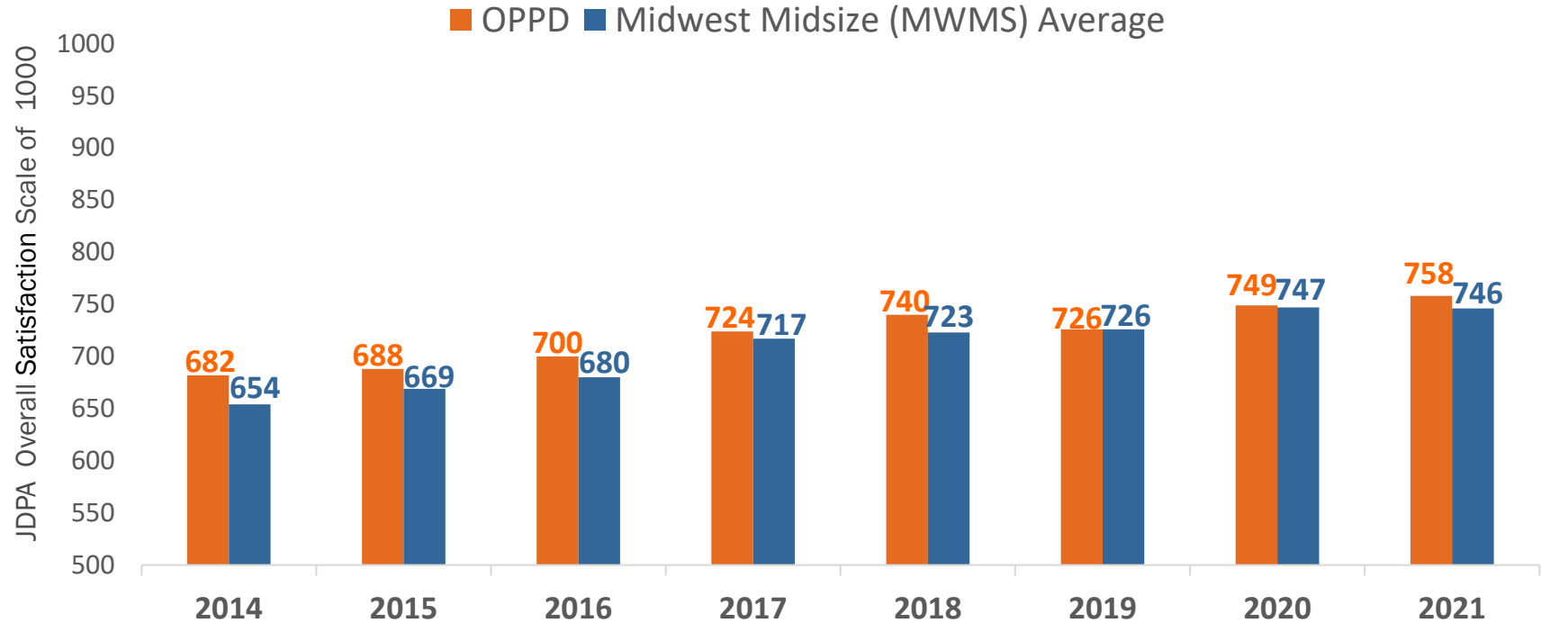
New Factor Weights	Power Quality & Reliability	Price	Billing & Payment	Corporate Citizenship	Communications	Customer Care
	25%	20%	17%	17%	12%	9%



Source: 2017-2021 JD Power Associates Electric Utility Residential Customer Satisfaction StudySM

2) Measure customer satisfaction

RESIDENTIAL JDPA CUSTOMER SATISFACTION INDEX 2014-2021 Historical Results¹



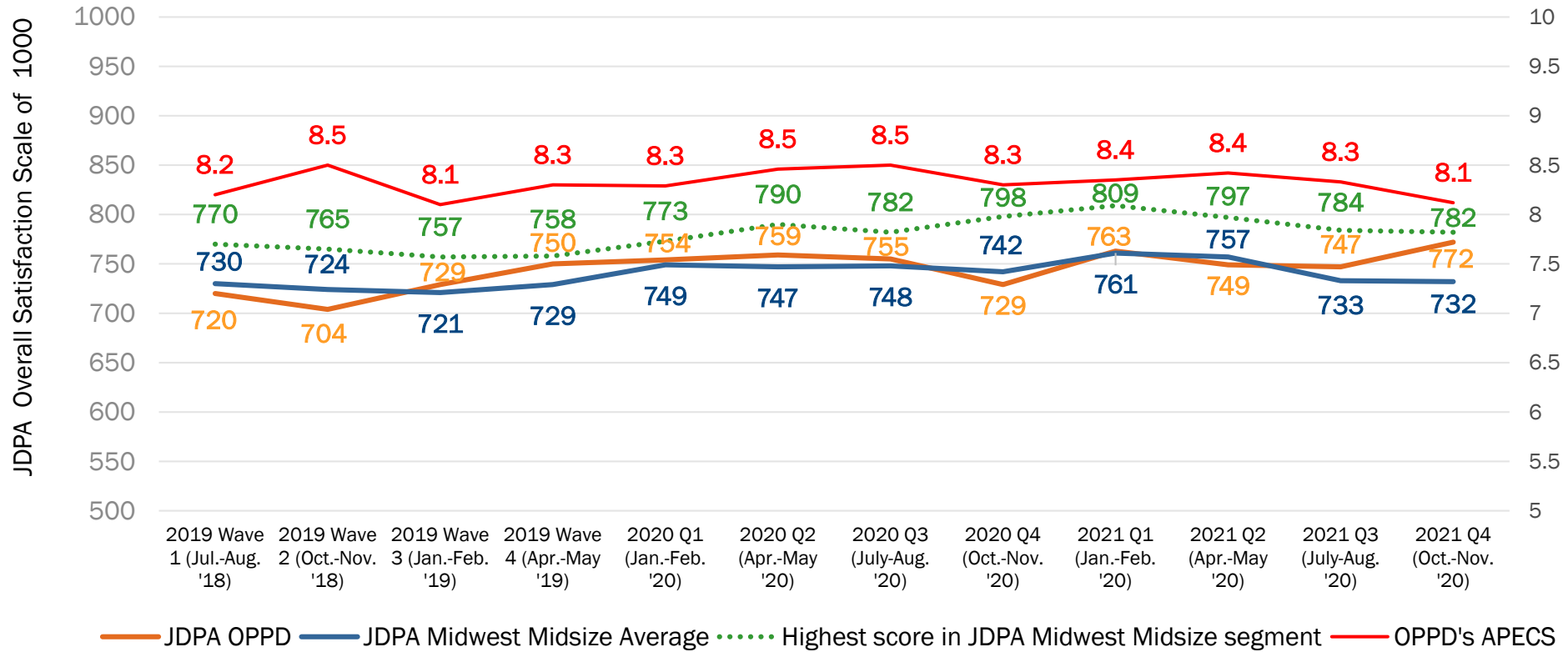
Quartile Ranking	1	2	1	2	1	3	2	1
# of MWMS utilities	17	18	15	15	15	15	16	16

¹Results are from 2014-2020 JD Power Associates Electric Utility Residential Customer Satisfaction StudySM

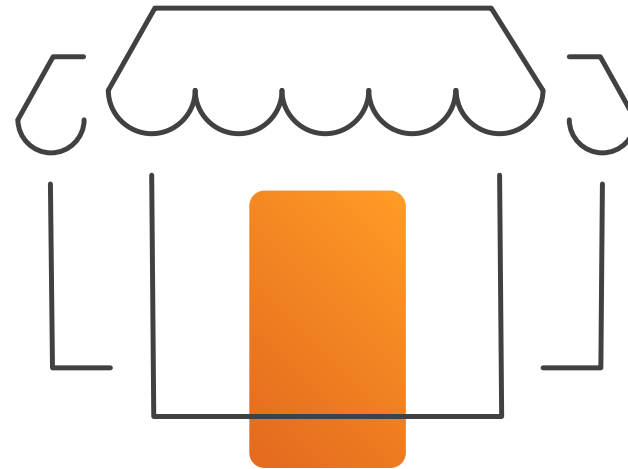
2) Measure customer satisfaction

2018-21 JD POWER RESIDENTIAL QUARTERLY WAVES V. OPPD PROPRIETARY TRACKING

Overall Satisfaction Index



2021 Business Customer Satisfaction

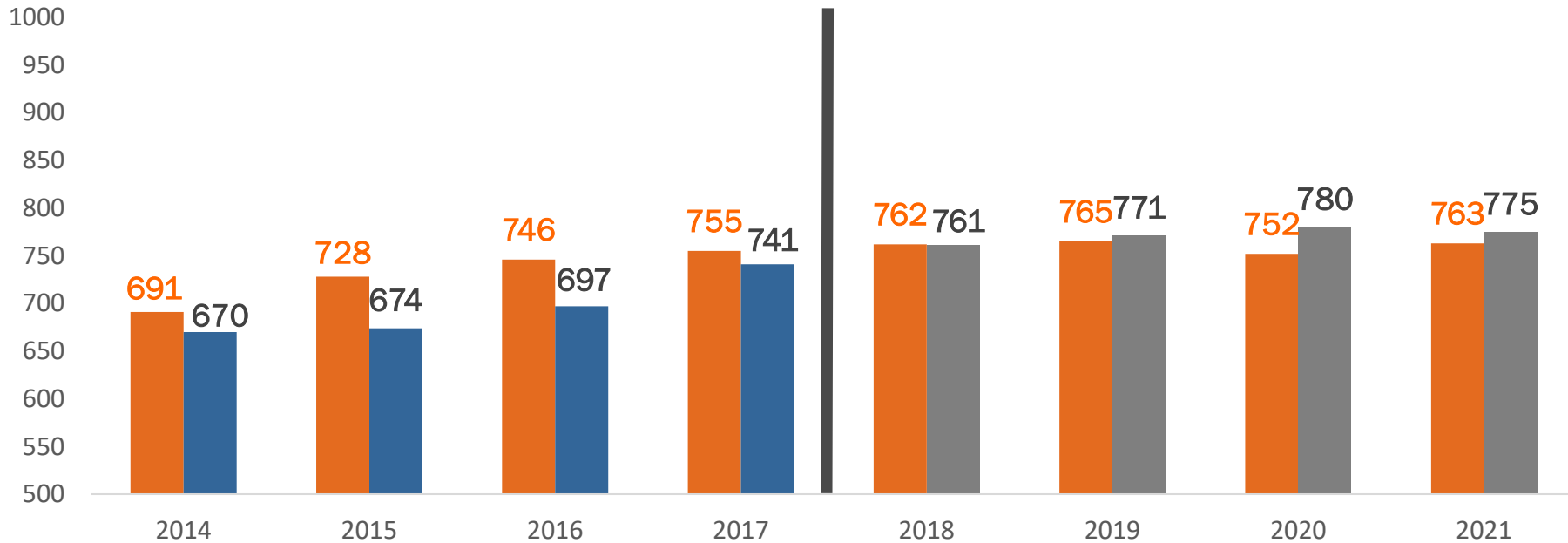


2) Measure customer satisfaction

BUSINESS CUSTOMER SATISFACTION IMPROVED MODESTLY

Business JD Power/Escalett Customer Satisfaction Index
2014-2021 Historical Results¹

JDPA/Escalett Overall Satisfaction Scale of 1000



	2014	2015	2016	2017	2018	2019	2020	2021
Quartile Ranking	1	1	1	1	n/a	3	3	3
# of Midwest utilities	12	11	10	10	18 ²	22	23	20

¹ Results are from 2014–2017 JD Power Electric Utility Business Customer Satisfaction StudySM and 2018–2021 Escalett Business Customer Engagement Study

² Midwest Midsize utility scores were not available at this point so comparison is to Midwest overall

2) Measure customer satisfaction

EXECUTIVE SUMMARY

- 1) Overall, we've continued to make gains, and just reached a residential customer satisfaction goal.**

We've achieved top quartile performance in residential scores, and made modest improvements in our business segment.

- 2) From a residential perspective, reliability is top of mind.** Experiencing high power quality and understanding utility efforts around maintaining reliability remain areas of focus.

- 3) Business customer engagement made modest improvements in 2021.** Scores are up slightly, and we're working to understand how sample sizes impact our relative rankings.

- 4) The team will continue with efforts correlated with higher scores, then re-group at year-end.**

We're finalizing analysis on areas of focus for the near-term that are not dependent on technology progress.

SD-5 ACCOUNTABILITIES

3) Prioritize using voice of the customer (VoC)

Use VoC to prioritize strategic plans, investments and operational activities to ensure high satisfaction in all aspects of OPPD's interactions with our customer-owners.

Customer feedback has influenced many initiatives this past year:		1 Polar vortex sentiment study	2 Block rates
3 Customer-owned generation	4 Energy education	5 Overall product marketing refresh project	6 Greener together
7 Energy burden solutions	8 Pathways to Decarbonization	9 EV managed charging	10 Future product features

4) Interact respectfully

Interact with customer-owners in a respectful, dignified and civilized manner.

- OPPD's Core Values
- Robust Call Monitoring Program
- Customer Surveys
- Customer Service Training

SD-5 ACCOUNTABILITIES

4) Interact respectfully

Interact with customer-owners in a respectful, dignified and civilized manner

	Target GOAL	2021 Year End
Courtesy of the representative	98%	97%
Helpfulness of the representative	98%	94%
“Thank you for being customer”	100%	96%

NOTE: Only for Residential customers. The work is planned to survey the Business customers.

*1 Responses with “very satisfied” or “somewhat satisfied”

5) Treat with fairness

OPPD shall communicate a procedure to customer-owners who believe they have not received fair treatment from OPPD.

Escalation Options:

- Account Supervisor
- OPPD.com
- Dispute process on disconnect notice

SD-5 ACCOUNTABILITIES

5) Treat with fairness

Communicate a procedure to customers who believe they have not received fair treatment from OPPD

	Target GOAL	2021 Year End
Representative's knowledge of OPPD's policies	98%	94%

NOTE: Only for Residential customers. The work is planned to survey the Business customers.

*1 Responses with "very satisfied" or "somewhat satisfied"

6) Provide trends and updates

Provide periodic customer-owner trend updates to the Board.

Trends in the following topics have been reported to the Board:

- Customer Trends - Credit & Collections
- Product Development Update

RECOMMENDATION

The Public Information Committee has reviewed and accepted this monitoring report for SD-5 and recommends the Board find OPPD sufficiently in compliance with Board Policy SD-5.



Mollhoff/McAreavey

DRAFT
RESOLUTION NO. 64xx

WHEREAS, the Board of Directors has determined it is in the best interest of the District, its employees, and its customer-owners to establish written policies that describe and document OPPD's corporate governance principles and procedures; and

WHEREAS, each policy was evaluated and assigned to the appropriate Board Committee for oversight of the monitoring process; and

WHEREAS, the Board's Public Information Committee (the "Committee") is responsible for evaluating Board Policy SD-5: Customer Satisfaction on an annual basis. The Committee has reviewed the SD-5: Customer Satisfaction Monitoring Report and finds OPPD to be sufficiently in compliance with the policy as stated.

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors accepts the SD-5: Customer Satisfaction Monitoring Report, in the form as set forth on Exhibit A attached hereto and made a part hereof, and finds OPPD to be sufficiently in compliance with the policy as stated.