

# Briefing on 2007 Client Survey Results



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California ISO  
Your Link to Power

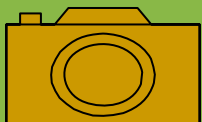
Board of Governors Meeting  
General Session  
March 26 – 27, 2008

# Client Survey is important input to continuous improvement process

Iterative  
approach:

Surveys,  
improvements,  
communications





# Snapshot: Survey Process

**Survey conducted Nov-Dec 2007**

**300 stakeholders invited to participate**

**Solid participation rate:**

- 79% of phone invitees participated
- 36% of web surveys

**All sectors represented**

# A unique approach to survey design

- *“the right questions of the right people”*

- ✓ Combination of web-based & phone surveys
  - Interviews conducted by consultant
- ✓ 8 targeted surveys – focusing on key ISO functions

Executive Level Interactions	Stakeholder Process, Policy & Legal	Regulatory Interactions <i>(Anecdotes)</i>	Settlements & Billing
Grid Operations	Infrastructure Planning	GMC & Budget	Market Operations

- ✓ Survey scores complimented by rich anecdotes

# A sampling of survey responses:

“Keep up the good work”

Benchmark questions:

*“CAISO’s service quality improved over the past year.” - 83% agreed*

*“The service provided by CAISO is valuable to my company.” – 82% agreed*

# A sampling of survey responses (cont.)

## “Keep up the good work”

Customers value access to Board & new meeting structure

Solid responses for Client Training – over 90% favorable

Executive-level outreach well-received

Good marks for staff professionalism & courtesy

Summer workshops garnered praise

# A sampling of survey responses (cont.)

## - "Improve these areas"

Stakeholder comment	Action Plan
<i>Stakeholder process improved; more work to be done</i>	<ul style="list-style-type: none"><li>✓ Post process on web</li><li>✓ New metrics</li><li>✓ Help stakeholders to contribute</li><li>✓ Account manager outreach</li></ul>
<i>Streamline customer access to systems</i>	<ul style="list-style-type: none"><li>✓ Customer self-service for certificate requests &amp; renewals</li></ul>

# A sampling of what we heard (cont.)

## - "Improve these areas"

Stakeholder comment	Action Plan
<i>MRTU – various topic areas</i>	<ul style="list-style-type: none"><li>✓ Faster response to customer issues</li><li>✓ Improve system stability</li><li>✓ Expand market sims</li><li>✓ End-to-end testing</li></ul>
<i>Demonstrate how CAISO used stakeholder comments</i>	<ul style="list-style-type: none"><li>✓ Ongoing effort to better characterize disposition of comments</li></ul>



# Going Forward – implement and verify

- 🌐 **April and May: Share action plans w/ stakeholders**
- 🌐 **May – Oct: Implement and monitor performance**
- 🌐 **Oct: Inform stakeholders of progress**
- 🌐 **Nov – Dec: Conduct client survey**
  
- 🌐 **All year: Transactional surveys provide additional indicators of customer satisfaction**