

A stylized compass rose graphic in light blue, featuring a central circle and four intersecting lines that form a cross with pointed ends. The word "NAVIGATOR" is superimposed over this graphic.

NAVIGATOR



Continued Success

Results of the IESO 2007 Customer Satisfaction Survey

Agenda



- Summary of Results
- Methodology
- Quantitative Results
- Qualitative Results
- Finding and Recommendations



Summary of Results

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- Strong reputation in the sector
- Continued strong rankings in core areas
- Improvements over last year's results
- IESO continues to be a leader in the sector
- Areas of concern include
 - Visibility of senior leaders
 - Smart Meters



Methodology



- Work designed to continue tracking
- Interview guide and questionnaire designed with IESO staff
- Survey work split into two parts for first time
 - On-Line Quantitative
 - One-on-One Qualitative Interviews
- 81 surveys completed; 51 Interviews



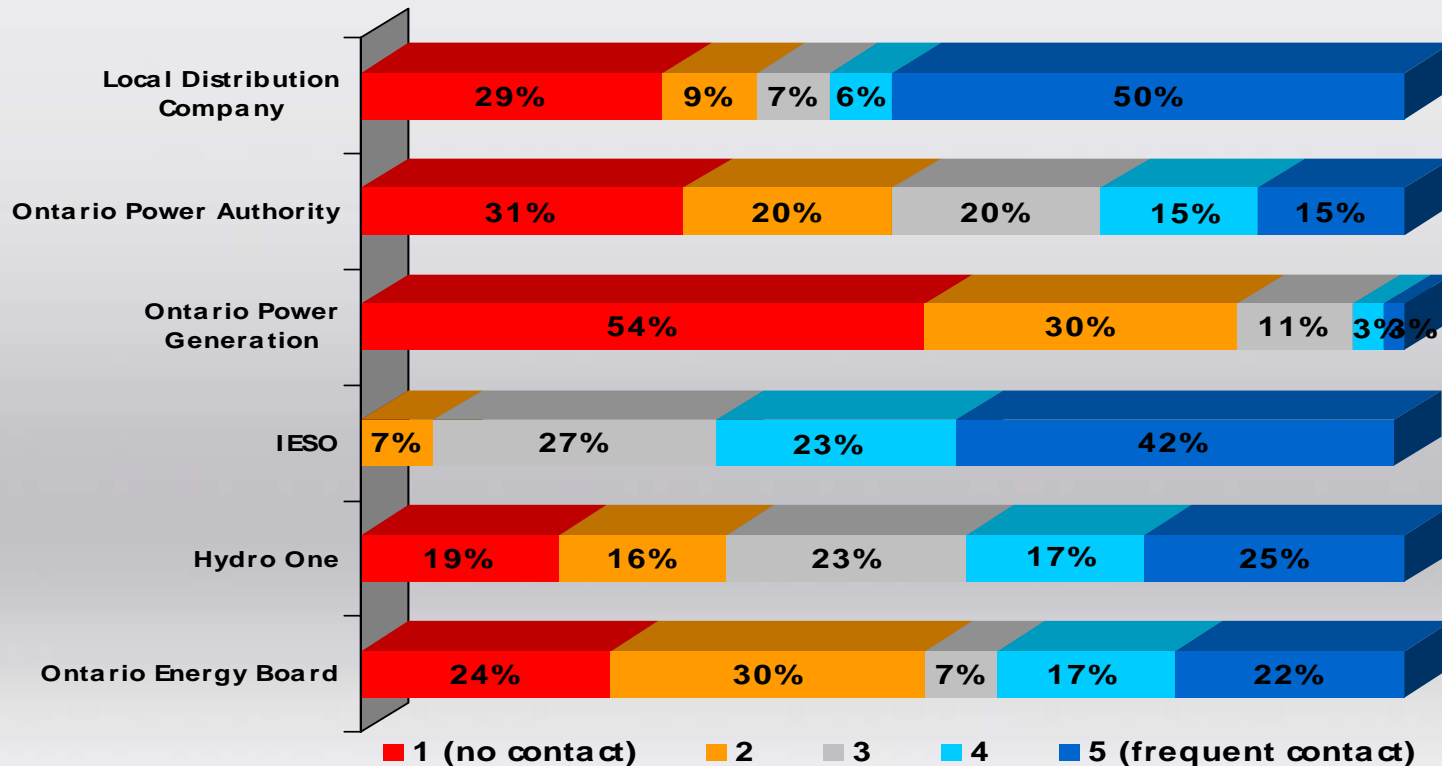
Quantitative Results

Customer Interaction



In your interaction with Ontario electricity power system you may come in contact with a variety of different organizations. Please give an indication of your level of interaction with some of these different organizations. One a scale of 1 to 5, with 1 being no contact and 5 being frequent contact.

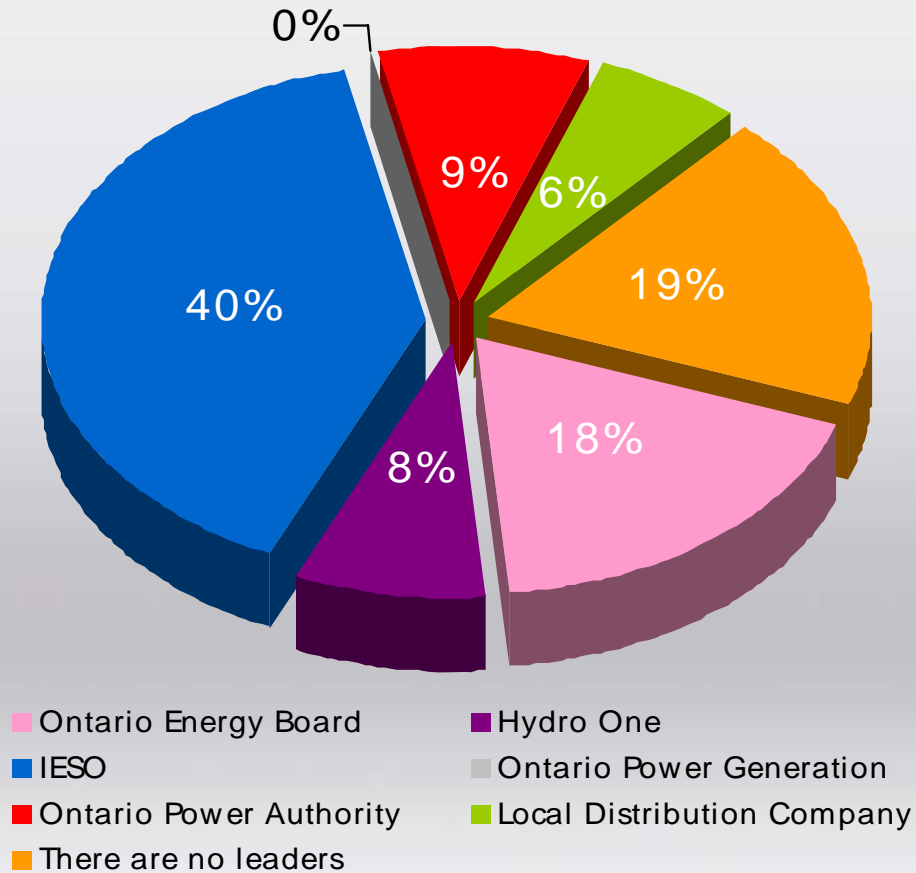
Total



Leadership



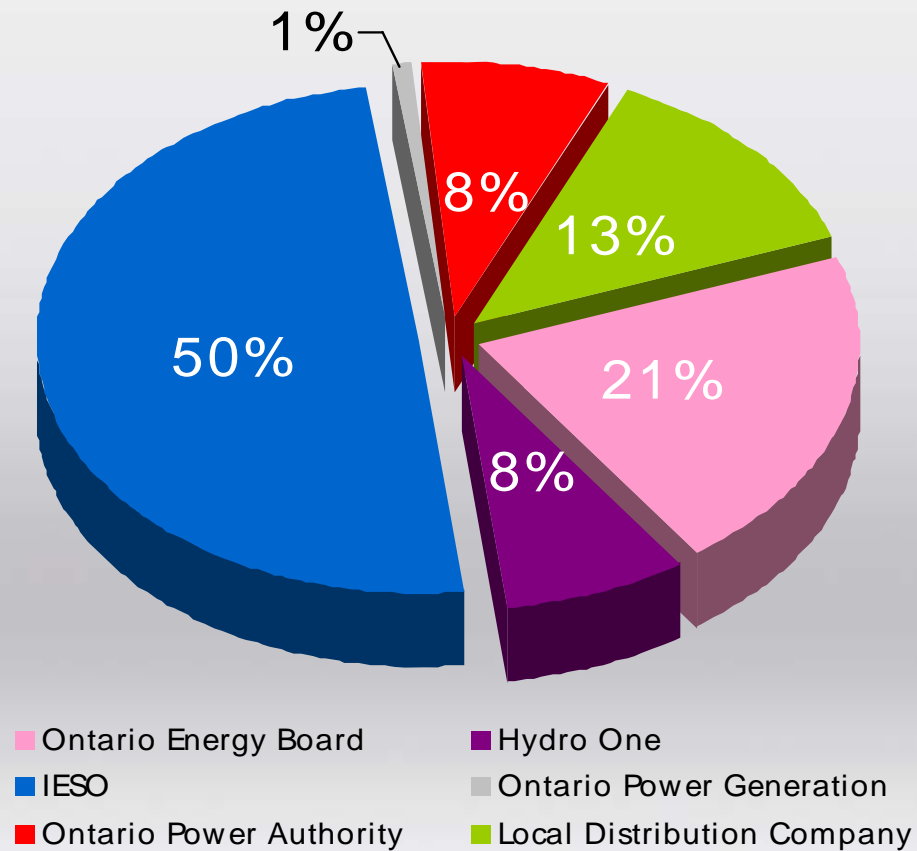
Of these groups, which one do you look to as a leader in the electricity sector in Ontario?



Credible Advice



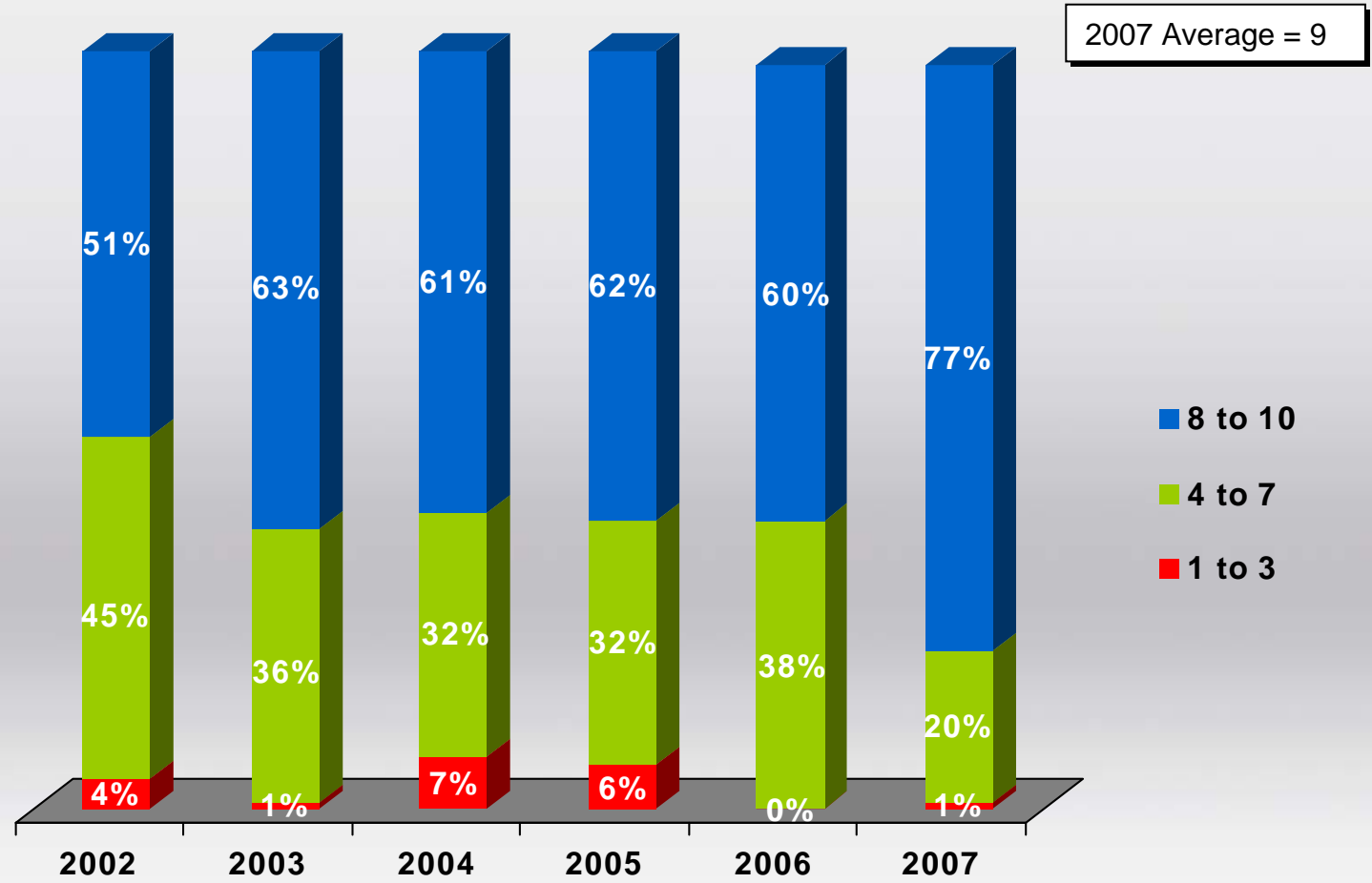
Is there one particular organization that you look to for credible advice and information on electricity issues in Ontario?



Relationship



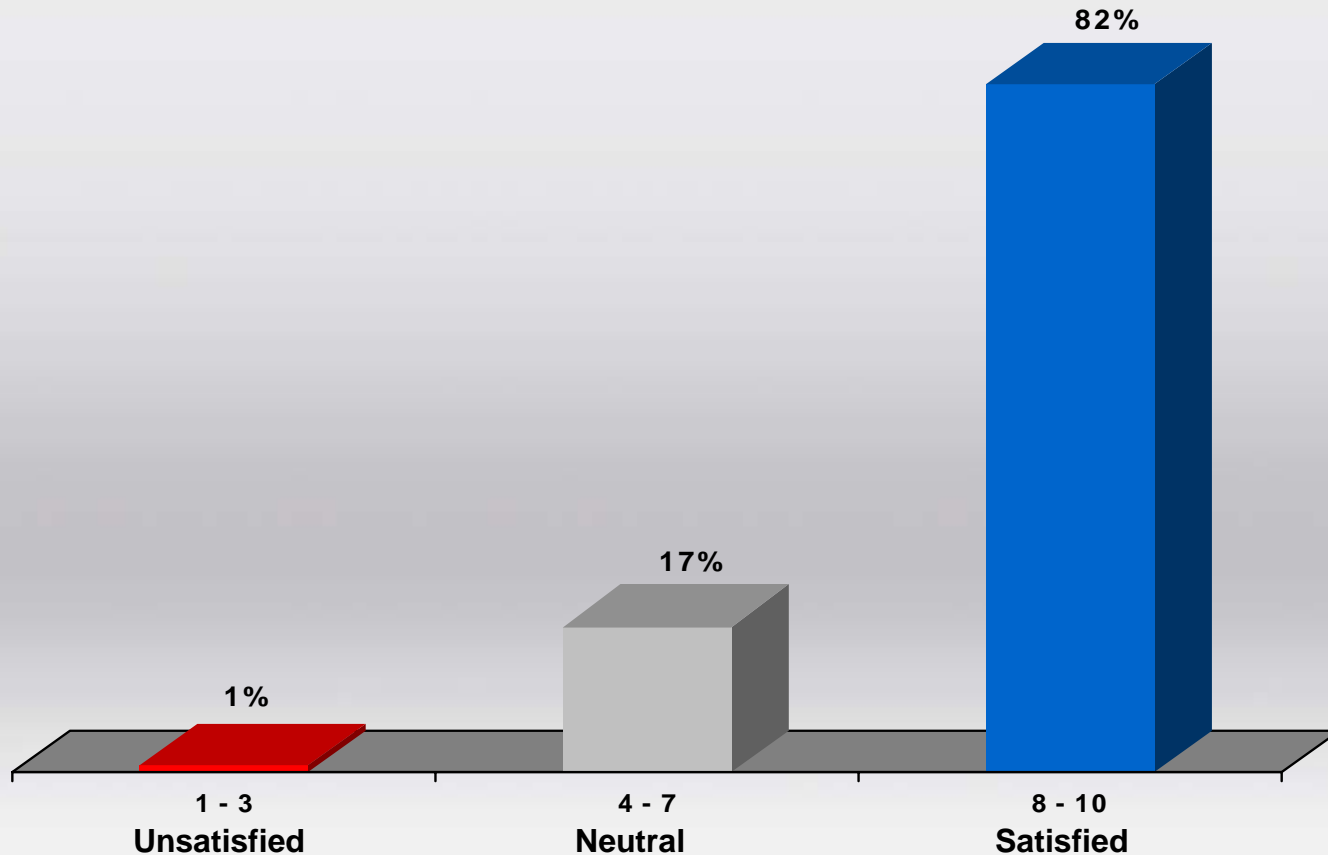
On a scale of 1 – 10, with one being the lowest or very bad and 10 being the highest or very good, how would you rate your overall relationship with the IESO?



Confidence in IESO Staff



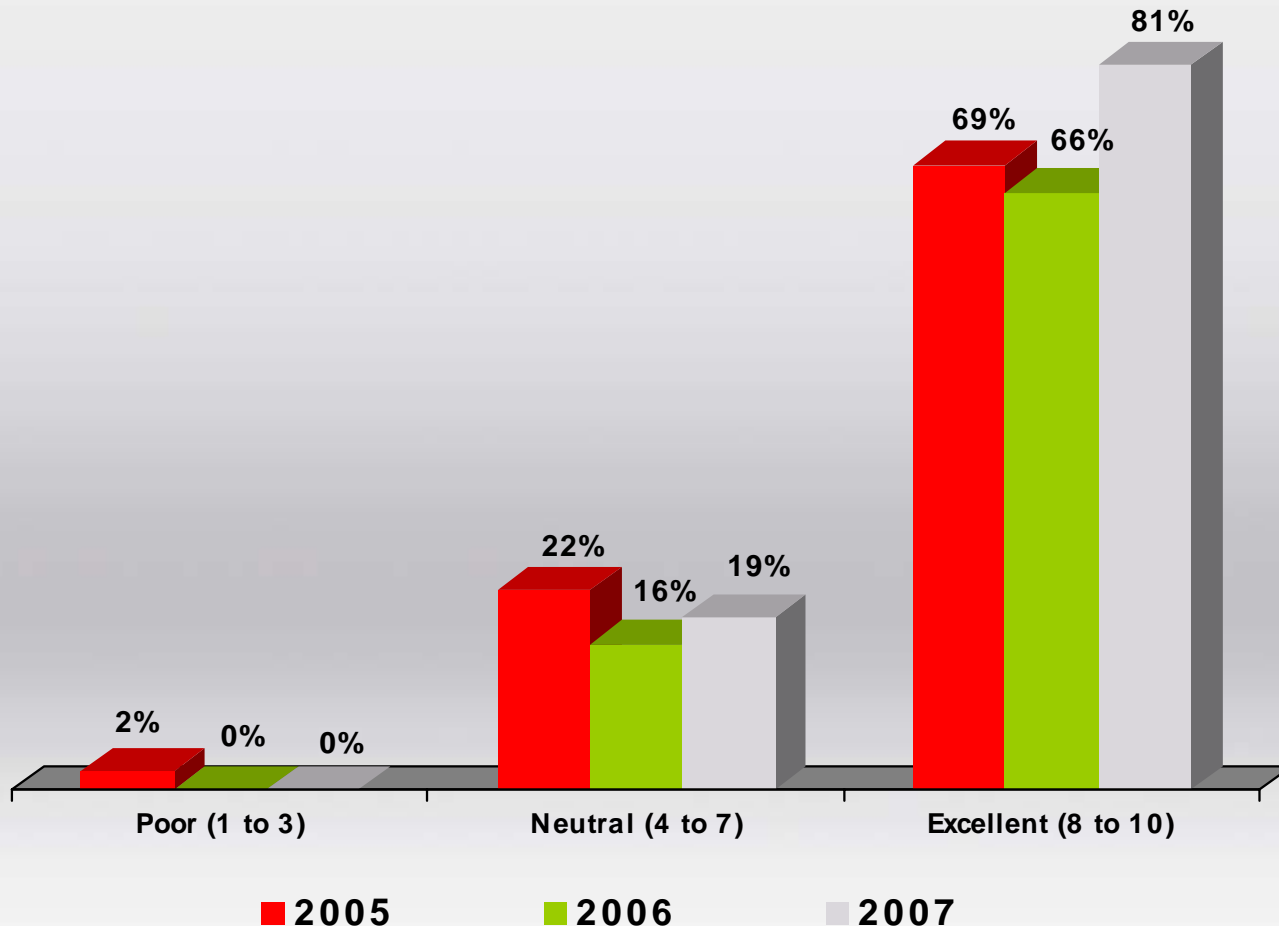
Indicate the level of capability of the IESO staff you are in contact with using a 10-point scale where 1 is very incapable and 10 is very capable.



Account Manager Relationship



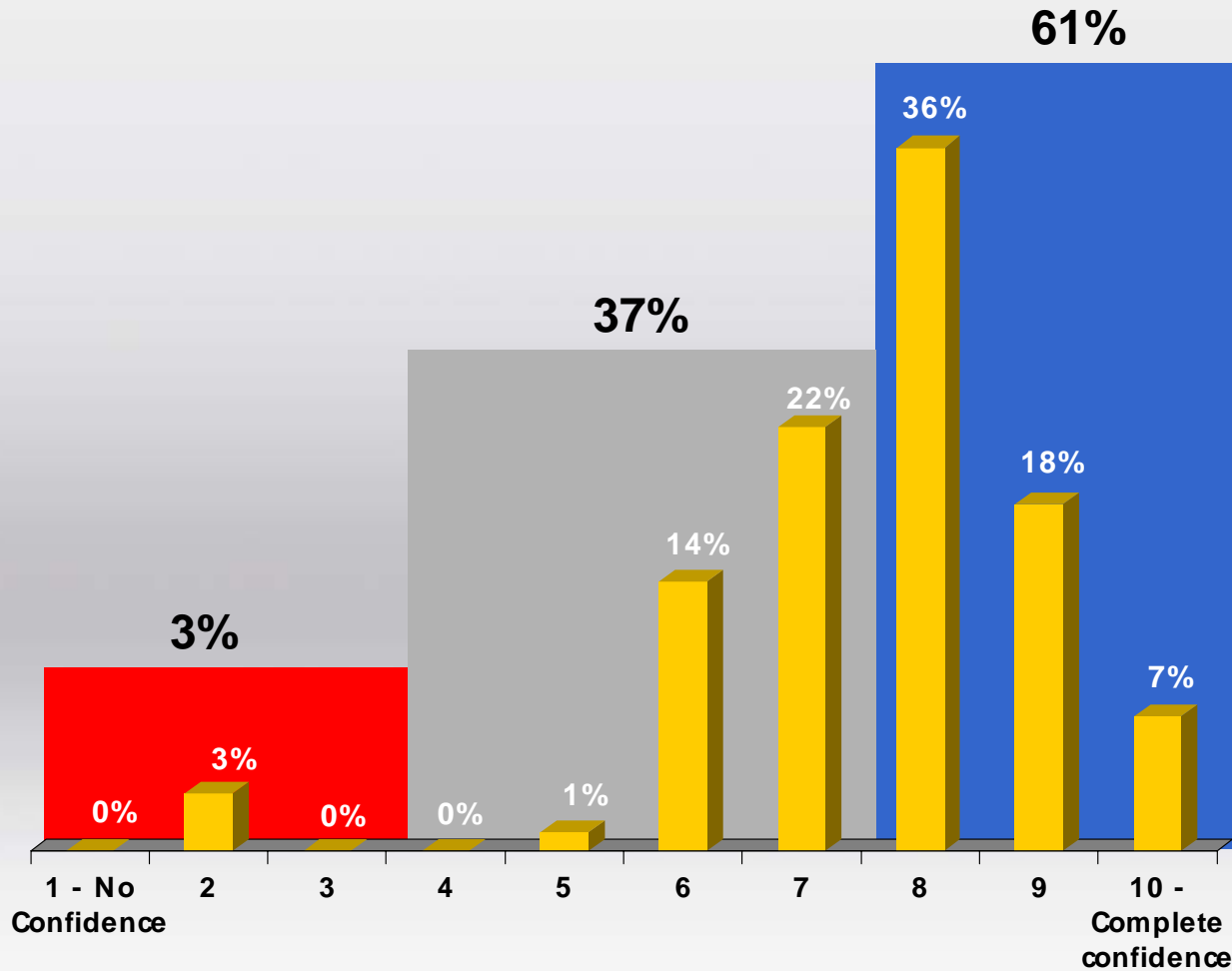
Using the 10 point scale we used earlier, how would you rate your relationship with your account manager?



Confidence in Senior Management



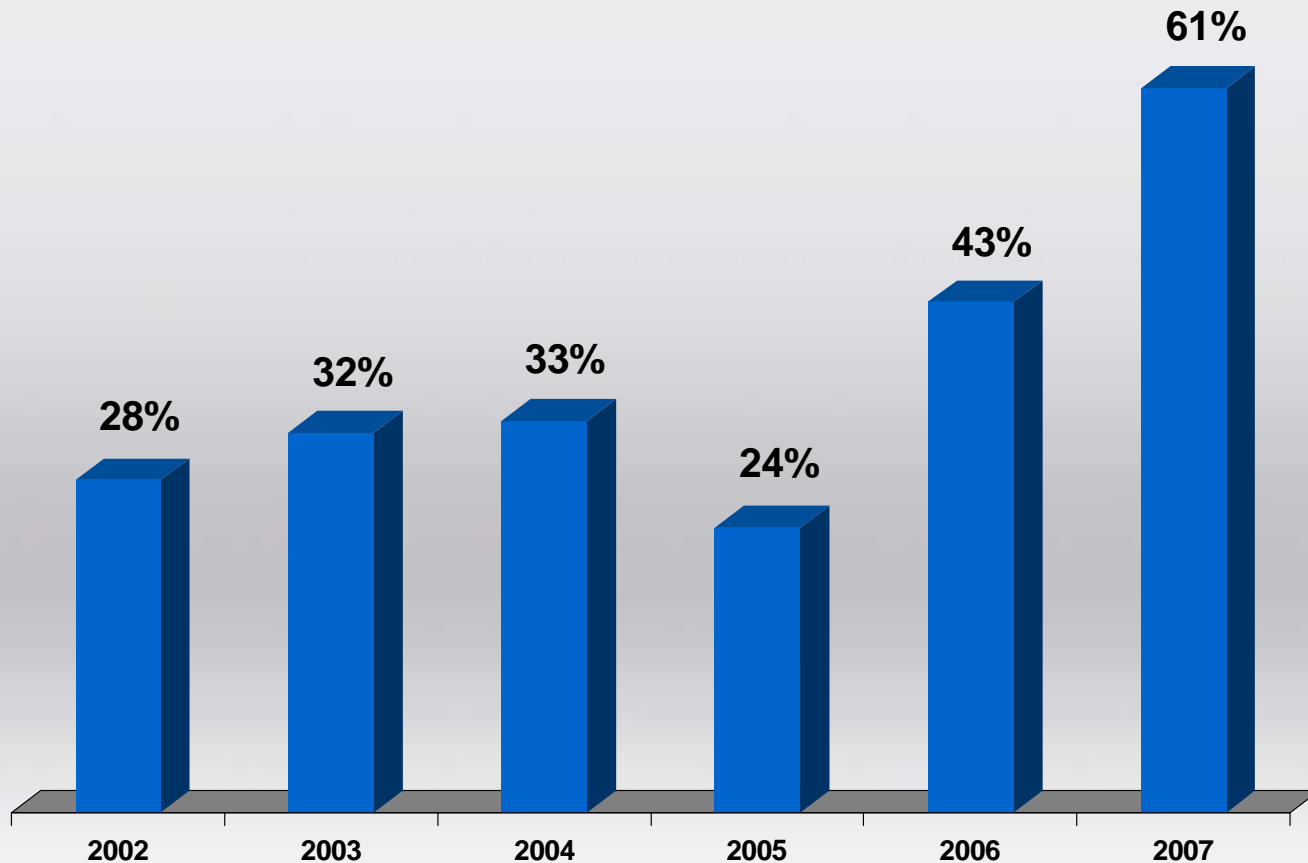
Indicate your level of confidence in the IESO's Board of Directors and senior management to operate and oversee the market using a 10-point scale where 1 is no confidence and 10 is complete confidence.



Historical Confidence



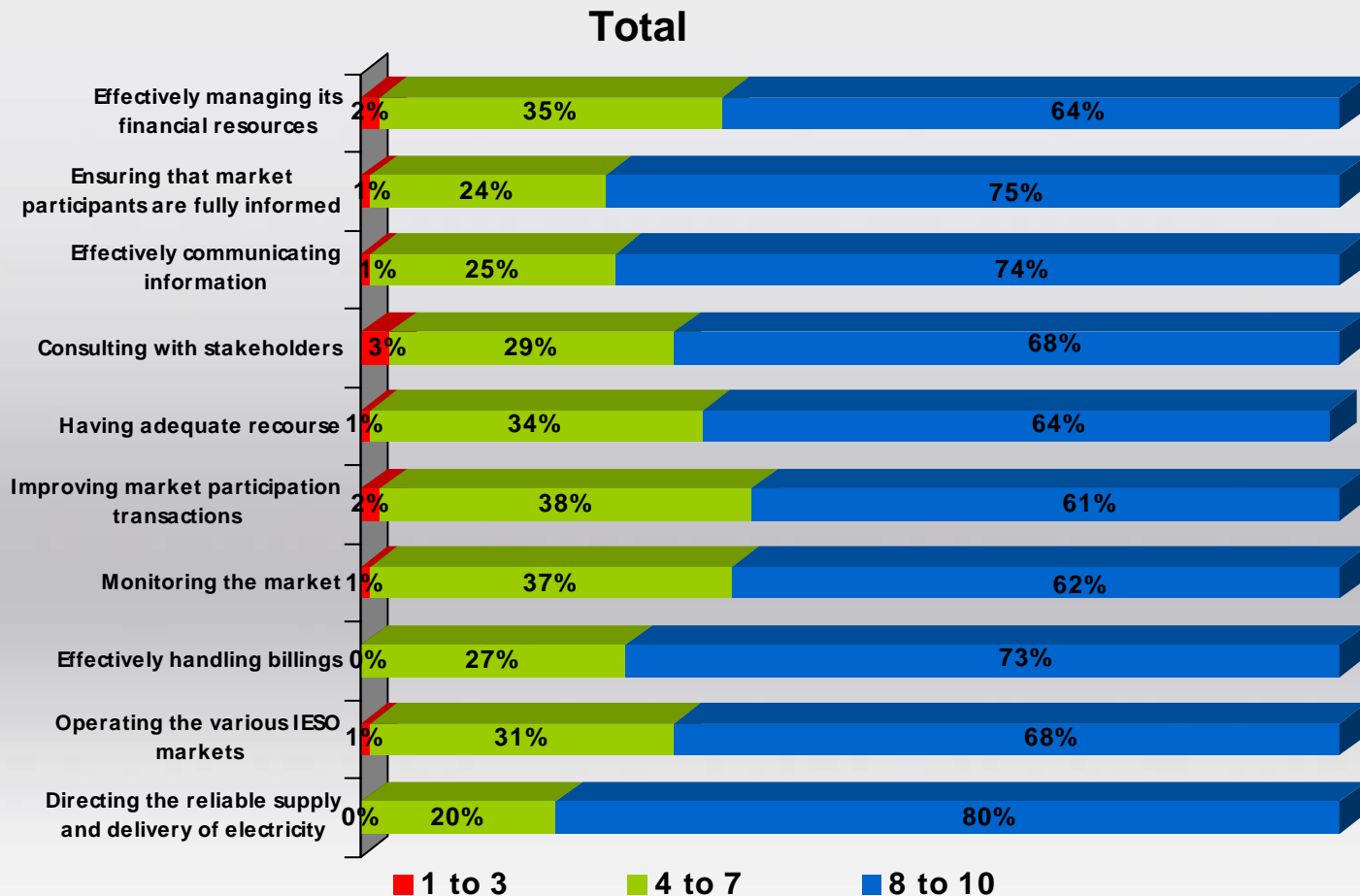
Indicate your level of confidence in the IESO's Board of Directors and senior management to operate and oversee the market using a 10-point scale where 1 is no confidence and 10 is complete confidence.



Performance Ranking



Now that we have discussed the various groups within the IESO, I would now like you to rate the performance on some of the current services provided by the IESO. Again using a 10 point scale, this time 1 will be poor performance and 10 will be excellent performance.



Historical Performance Ratings



Now that we have discussed the various groups within the IESO, I would now like you to rate the performance on some of the current services provided by the IESO. Again using a 10 point scale, this time 1 will be poor performance and 10 will be excellent performance.

	2006	2007	Change
Improving transactions	32%	61%	+ 29%
Effectively managing its financial resources	34%	64%	+ 30%
Consulting with stakeholders	47%	68%	+ 21%
Monitoring the market	49%	62%	+ 13%
Having adequate recourse	49%	64%	+ 15%
Ensuring that market participants are fully informed	52%	75%	+ 23%
Effectively communicating information	62%	74%	+ 12%
Effectively handling billings	62%	73%	+ 11%
Operating the various IESO markets	66%	68%	+ 2%
Directing the reliable supply and delivery of electricity	81%	80%	- 1%



Qualitative Results

Ontario Electricity Sector



- Much higher levels of optimism
- Does not indicate satisfaction with the sector
- Customer specific issues still discussed
 - LSEs, industrial pricing, LMP, etc.
- Agency review hotly debated



- IESO considered a leader in the sector
- OPA and IESO more distinct this year
- Lack of knowledge of longer term plans
 - Where is the IESO going?

IESO Challenges



- On-going role for the operator
- MDMR and Smart Meters
- Agency Review



- Respected for technical expertise
- High praise for
 - Account managers
 - Communications staff
 - Control room staff
- More meaningful workshops and stakeholder process

IESO Products and Services



- Advocacy efforts noticed
- Customer education appreciated
- Weekly Bulletin an unqualified success



- Prudentials work appreciated; but not perfect
- Administrative processes improved
- 18 Month Outlook a “Must Read”
- Stakeholder process meaningful, outcomes debated



Findings and Recommendations

- Continued strong rankings in core areas for the IESO
- Smart Meters
 - Success or failure of the implementation of MDMR and Smart Meters represents risk to IESO. Customers are pleased with process so far.
- Administrative Burden
 - Customers, particularly LDCs remain concerned about the administrative burden placed on them. Further investigation and action would help.
- Stakeholder Process
 - Improvement on the process over last year's results. Customers see it as a legitimate process even if results are not what they wanted.



- Partnership with LDC where possible
 - Frequency of contact of IESO with customers is second only to host LDC; working together will achieve greater results than separate
- Senior management must be seen more frequently
 - Not only is there a thirst for directional statements; more familiarity will assist IESO brand in times of crisis
- Weekly Bulletin extremely well received
 - Thought could be given to central, searchable archive of issues.
- Clear Policy, Points of Differentiation
 - Definition of on-going role and importance is critical; reliability outlooks important, but state of industry is as well. Sector still desperate for leadership.