

Ontario Energy Board



# The SCORECARD COMMUNICATIONS GUIDE

FOR ELECTRICITY DISTRIBUTORS

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## DISCLAIMER NOTICE

The *Scorecard Communications Guide* (the Communications Guide) has been prepared by OEB Audit and Performance Assessment as an operational document and is not intended to create any new OEB policy or to re-define the existing policy which can be found in *Report of the Board - Performance Measurement for Electricity Distributors: A Scorecard Approach*, the Renewed Regulatory Framework for Electricity or other documents of the OEB. Where needed, the Communications Guide provides options to promote best practices that can be adopted by distributors.

With the exception of the minimum communication channels, all remaining scorecard communication activities are offered as additional options, as determined by the specific circumstances of any one distributor.

## Distributor Scorecard Communication Best Practices

The following list provides examples of tools, processes and activities that distributors may consider undertaking to increase customer awareness of their Scorecard, convey the Scorecard's key findings, and educate their customer base on the value proposition of performance measurement and continuous improvement more generally. While the distributors are not mandated to pursue these initiatives, they are encouraged to consider them as potential means of promoting electricity sector literacy and facilitating a meaningful dialogue with their customers.

### Minimum Requirements for Communicating the Scorecard to Customers

While, respecting that customer communication needs and options may vary by distributor, establishing minimum requirements for communications protocol are necessary to ensure that all customers, province-wide are provided with consistent options to become informed about their distributor's scorecard performance outcomes.

It is reasonable to expect that electricity distributors make its scorecard accessible, transparent and visible to their customers. In order to achieve this objective, the following minimum communication actions are required:

1. Ensure the Scorecard is prominently featured and easily and clearly visible on the homepage of the distributor's website;
2. At least once annually, alert customers through a bill message (physical and electronic bills);
3. Ensure your customer-facing staff are aware and knowledgeable of the Scorecard

### **1. Own Your Scorecard Results**

Avoid referring to the Scorecard and the associated materials as the "OEB Scorecard". Instead, call it the <Name of your Distributor>'s Scorecard, for the year 20XX, e.g. Distributor XYZ's Scorecard for 2014.

### **2. Leverage the Existing Communications Materials**

The OEB has developed a set of [Frequently Asked Questions](#) (FAQ) regarding the Scorecard and its use, along with [plain-language explanations](#) of all the measures. Consider placing these documents on your website next to the Scorecard itself, or providing a link to the OEB website.

### **3. Educate your Employees**

Effective communication with customers starts with well-informed employees. Ensure that employees beyond the Regulatory/Finance/Reporting departments are aware of the Scorecard

and its contents and understand the drivers underlying its publication. This is particularly important for employees in customer-facing roles, such as Customer Service Representatives.

Consider providing the pertinent information through internal seminars, newsletters, or Intranet pages. For further visibility and to convey the importance of this undertaking, consider tracking the Scorecard results on a quarterly basis and publicizing the results within your utility.

#### **4. Use a Variety of Communication Channels**

Utilities use a number of ways of approaching their respective customer bases. Most of them can be effectively utilized to encourage your customers to review your Scorecard and Scorecard MD&A, and provide you with their feedback. These include:

- Bill inserts and electronic bill messaging;
- Facebook and Twitter Feeds;
- Distributor website ads;
- Call Centre Script / Interactive Voice Response (IVR) Messaging;
- Email communications;
- Annual Reports and financial disclosure documents;
- Sustainability / CDM reports;
- Incorporate the Scorecard into existing distributor educational initiatives or promotions, where applicable;
- Link the Scorecard to website references, such as reliability and customer service offerings.

To optimize your utility's Scorecard communication efforts, consider integrating your plans into the overall Communications Plan.

#### **5. Collect annual information on the usefulness and effectiveness of your Scorecard communication efforts.**

- Track the number of hits on your Scorecard web page and compare them with other distributors, taking note of the location of the Scorecard info on their website and the scope and nature of their communication efforts on the subject
- Baseline year-over-year comparisons of web and social media analytics to measure the effectiveness of your Scorecard communications.
- Include simple information query buttons at the bottom of the Scorecard / Scorecard MD&A web pages, prompting one-click customer feedback (e.g. "Was this information helpful to you? Click YES/NO; or "Would you like to learn more about these areas?" Click: YES/NO).

- Invite customers to fill out feedback surveys following the review of the Scorecard. Survey questions may include:

Scorecard Feedback

- 1) Were you aware of the Scorecard prior to this visit to our website?
- 2) What do you like about the Scorecard and the Scorecard MD&A?
- 3) What areas would you like to learn more about?
- 4) What is the most convenient way for you to receive this type of information?
- 5) Which of the measures are the most important to you?

Company Performance

After reviewing our performance scorecard, do you feel confident that <Name of your Distributor> is:

- 1) Providing good value for money?
- 2) Operating Efficiently?
- 3) Spending wisely?
- 4) Providing good customer service?

Now that you are aware of our recent performance

- 1) Do you have a positive feeling about\_<Name of your Distributor>?
- 2) Do you trust <Name of your Distributor>?

Make reference to the distributor's scorecard in customer surveys, to measure awareness and impact.

## 6. Simplify / Summarize the Scorecard Results

In communicating the Scorecard results with your customers, consider providing targeted or focused scorecard versions, highlighting one, or several measures that may be of particular interest to your customers. This can be done through callout ads (web or printed) providing concise information statements and inviting the customers to explore the remaining subject matter by following a link:

*“Did you know that Utility X has met 99% of its customer appointments in 2014? To learn more about our performance statistics [click here](#) (link to the full Scorecard and MD&A).”*

To concisely convey the key points about the Scorecard information, use the new Overview Section of the Scorecard MD&A Guide. The purpose of this section is to provide the customers with most pertinent information about the utility's performance, and to foreshadow the information contained in the remainder of the Scorecard MD&A, inviting the customers to explore it as needed.

Include a quick write-up (1-3 sentences) explaining the purpose of the Scorecard and the nature of the information it contains on your website next to the link to the Scorecard web page.

## **7. Engage your Customers in Person**

Consider conducting customer Focus Groups, Town Hall-style meetings or other types of face-to-face engagements to educate the customers on the individual Scorecard measures, discuss your utility's performance, and solicit their feedback on the issues that they deem important. Given the costs associated with in-person sessions, consider integrating the Scorecard information into the existing / planned customer engagement activities, such as those associated with the Distribution System Plan customer engagement.

## **8. Responding to Below Average Results**

Even top performers can experience a performance slump at times. And, there's usually a reason that can easily be justified and addressed. Don't shy away from communicating poor performance. Leverage the MD&A section and Web or other content-rich channels to tell your annual story, explain why some of the numbers are "off" and the corrective actions your organization is taking to improve over time.

The openness and transparency is appreciated by customers and goes a long way towards demonstrating integrity and trust of your organization and its leadership. Be sure to follow through next year, to demonstrate how your plan of action is making a positive difference.