

2018 | 2019 REGISTRATION

CSBA FEAL SUPERANNUATION CX / NPS BENCHMARKING



CONTACT DETAILS	
Organisation name:	
Contact name:	
Position:	
Mailing address:	
Phone:	Email:

MEMBER SURVEYS	#	FEES PER YEAR \$ + GST *
200 Member Interviews each wave (in Feb18, Jul18, Feb19, Jul19)		\$17,900
Additional Interviews – 100 extra each wave (200 extra per year)		\$9,900
Additional Question – 1 per wave (2 per year)		\$2,900
TOTAL FOR MEMBER SURVEYS (+ GST)		\$
EMPLOYER SURVEYS		
100 Employer Interviews each wave (in Feb18, Jul18, Feb19, Jul19)		\$9,900
Additional Interviews – 100 extra each wave (200 extra per year)		\$9,900
Additional Question – 1 per wave (2 per year)		\$1,500
TOTAL FOR EMPLOYER SURVEYS (+ GST)		\$
<u>YOUR TOTAL COST (+ GST)</u>		\$

* All costs are for FEAL Members. An additional 10% fee is required for non-FEAL Members

Additional interviews, coding, analysis, reporting and presentation options available upon request for additional fees.

Please note: Fees for 2018 to be invoiced in full upon registration, with 2019 fees to be invoiced in Dec18. Fee covers cost of interviews undertaken by telephone, reports and registration for two attendees at an annual forum. By signing this Registration Form you are agreeing to participate in the CSBA FEAL Customer Experience / NPS Benchmarking Survey and agree to abide by the terms and conditions outlined overleaf.

CANCELLATION A refund of 50% will be provided for withdrawal from this program only where more than 90 days notice is provided prior to interviewing.

KEY DATES (subject to change)

2018-19 Registration Closes	19 January 2018 (February wave), 18 June 2018 (July wave)
Contact Details Required	Mid January 2018
2018 (Feb) Survey Interviewing	February - March 2018
2018 (Feb) Reports Released	April 2018
2018 (Jul) Survey Interviewing	July - August 2018
2018 (Jul) Reports Released	September 2018
2018 Workshop at Melbourne Business School	October 2018

Please email completed form to drew.olarenschaw@csba.com.au or call 03 9605 4900 if any questions.



MEMBER SURVEY CONTACT DATA REQUIREMENTS (complete details provided after registration)

- Minimum of 5 times the agreed sample size of valid contacts per survey with 50% of contacts aged up to 55 and 50% aged 55 or over.
- To minimise calls to members who are not aware of their fund, contacts provided must have had recent contact with the fund, preferably in the previous 6 months, with the contact preferably by telephone for consistency across funds.
- Each contact requires at least member’s first and last name, gender, valid phone numbers with area code, state, member ID, age and balance.
- Reporting is provided for all funds who include the member’s **time in the fund** and if the member has a **default or custom investment**.
- Reporting by other variables included for members is available for additional fees.

EMPLOYER SURVEY CONTACT DATA REQUIREMENTS (complete details provided after registration)

- Minimum of 5 times the agreed sample size of valid contacts per survey per fund for, with 50% employers contributing to your fund for less than five employees and 50% employers contributing to your fund for five or more employees.
- Each contact requires at least the employer's first and last name, gender, position, company name, valid phone numbers with area code, state, number of employees contributing for and employer balance.
- Reporting by other variables included for members is available for additional fees.

Agreement & Undertaking:
The objective of the program is to provide quality and comparable data that allows participating funds to monitor and improve customer satisfaction and experience. As this requires due care and consideration, participants in the CSBA FEAL Customer Experience NPS Benchmarking Program agree to the following guidelines:

1. Provide a random sample of customer and employer contacts (all must be eligible to contact for research purposes) to meet the specific criteria (including but not limited to the quantity of contacts, contact details, member types and recent contact) requested by the agreed date in an agreed format.
2. Not manipulate the contacts provided in any way that may skew the results, including providing a sample that may produce more favourable results, or coercing individual contacts to, or not to, participate.
3. Provide contact details that are current and accurate.
4. Provide a contact list that does not include any customers who have asked not to be contacted.
5. Where unusable contacts are provided, or if additional sample is required, provide replacement contacts in a timely fashion.
6. Communicate to the internal organisation and contact centre that the survey is being conducted and its purpose.
7. Provide a person within the organisation who can be contacted in the event of any queries or issues regarding members.
8. Provide CSBA with any information that may impact the integrity of the survey in a timely fashion.
9. Survey results are to be used for research purposes only and within Research and Privacy guidelines.
10. Any findings from the research which are published are subject to CSBA approval, and must ensure they are not misleading or incorrect and that nobody shall be adversely affected or harmed as a direct result of this information.
11. Not reveal any results or information derived from the survey about any other company involved in the survey without the written permission by that company.

I am authorised to represent my organisation and agree to comply with the points and principles as well as all requirements and policies outlined in this registration form.

Signature: _____

Printed Name: _____

Date: _____

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