

National Grower Register

Industry Satisfaction Review 2002-2007 (*Summarised*)

INTRODUCTION

Background

NGR Pty Ltd was formed in 2002 as an initiative between the leading agribusinesses of ABB and GrainCorp. Together these founding shareholders have funded the development and initial operation of the NGR system. NGR Pty Ltd continues to manage the NGR system.

The National Grower Registration system offers grain growers across Australia a secure and streamlined registration process using a single delivery card. Registration is free to all growers. NGR cards can be used across Australia for delivery to a number of sites and to different marketers and traders.

Our call centre maintains a secure and up-to-date database of growers and ensures responsive and efficient processing of enquiries and applications. System users are provided with access up to 24 hours per day, 7 days a week.

Historical Data in context

Data collection and reporting standards have improved greatly since NGR's inception. Data predating 2003-2004 is taken from available data, but it is not known if this represents a full and accurate data set as information may be missing from these years.

Methodology

NGR has focused on two core client groups in gauging industry satisfaction with the NGR service; Australian Grain Growers of which NGR interacts with some 41000 individuals and our corporate clients, termed "Registered Parties", which number 68 clients and represent the majority of bulk handlers, marketers and traders in the grains industry.

To collect satisfaction levels from these groups, qualitative and quantitative measures have been used.

Quantitative

Since 2004 NGR has offered a paper-based survey that growers or RP's can complete at any time. Uptake for this feedback mechanism has been poor and no official record has been kept of the results. In late 2005 NGR introduced an online customer survey for both client groups which had yielded much more measurable results and in higher quantities.

The other quantitative approach is to measure the number of forms vs phone calls following a verification mail out, and the nature of the phone calls. NGR infer from this data that the less phone calls and the more forms, the more acceptance and understanding of the system growers are exhibiting. It can also be seen from the nature of the calls how well NGR is communicating with and servicing growers. For example of the number of calls to ask for clarification or to question a process is high this indicates poor satisfaction / understanding. However if the number of calls is largely updates to data – that is instead of returning a form – the nature of calls demonstrate acceptance / satisfaction with NGR.

Qualitative

NGR maintains a complaints and comments register, which has been used to build a picture of industry acceptance and concerns over a period of several years. NGR has also researched some specific areas of activity and witnessed some third party actions which can be used to interpret NGR's standing in the grains industry. One example of this would be uptake by third parties of the NGR identifier. This action has been gradually occurring since 2005 where non-registered parties will adopt the NGR number in lieu of their own, or other identifiers.

QUANTITATIVE RESULTS – Growers

NGR strengths identified through survey's in 2006;

People

The results of the survey and comments from growers indicate that fast, personal service is important to our clients. Time on hold and automated messages are to be avoided. Resoundingly both in the statistics and comments growers have commended the people within the call centre and NGR team members are considered one of our greatest strengths.

Systems

The NGR system as a concept now receives wide approval from Growers although most admit they were reluctant in the beginning. Many growers qualified their approval of NGR by suggesting that AWB and all traders align themselves with the NGR card system. NGRs overall approval rate was high (26% good, 62% V good or excellent) indicating that our systems are solid and produce a good service for growers.

Communication options

Many growers identified that phone contact was important to them for instant support (66%). Also within the results many growers indicated that they would prefer email as either a primary or secondary option (22% combined would prefer web or email). NGRs current IT development and communication strategy can utilise this emerging preference by offering more online functionality and email correspondence. It is understood that due to the regional location and demographic of our clients email and web can never completely replace phone / post /fax, however any uptake of electronic communication will offer the Growers and NGR many benefits.

NGR strengths identified through survey's in 2007;

People

Again, both in the statistics and comments growers have commended the people within the call centre and NGR team members are considered one of our greatest strengths. However the while the NGR staff have been commended on their customer service, the overwhelming comment has been a lack of reason to contact NGR due to ongoing drought. It is believed that the extremely high level of comments referring to not conducting business due to the drought is evidence of the general mood of the grain industry at present and will have some impact on the tone of the results.

Professionalism

75% of growers rated NGR's professionalism as either Very Good or Excellent with only 2% rating these criteria as fair or poor. Comments supported the sentiment that overall the Call Centre's professionalism and efficiency has been commended.

Systems and concept

NGR's overall approval rating has remained fairly stable with a slight move toward a more positive rating. Once again 62% of growers rate overall satisfaction as Good or Excellent with 35% rating this as "Good" compared with 26% rating satisfaction as Good in 2006. This result along with a significant reduction in the number of negative comments about the NGR concept is a positive signal about the acceptance of the NGR amongst growers.

Communication options – Email

Less growers nominated phone as their preferred contact in the 2007 results (63%) than 2006 (66%) with a trend toward email and web which was up significantly from 22% to 35%.

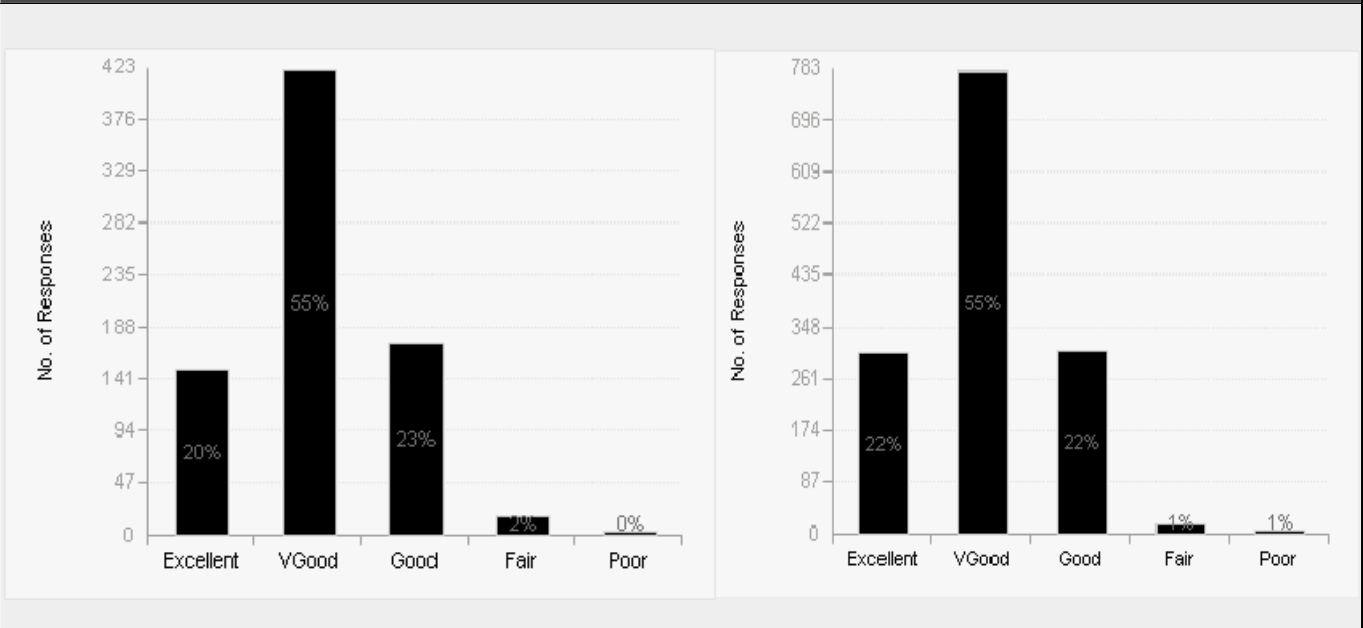
This demonstrates that NGR is moving in the right direction offering and promoting more internet and email options rather than the traditional phone / fax methods. This strong swing toward electronic communication is an important finding in light of NGR's current direction and shows that efforts toward developing these options are likely to be accepted and welcomed by the growers.

NGR approval ratings identified through 2006/2007 survey's;

2006

2007

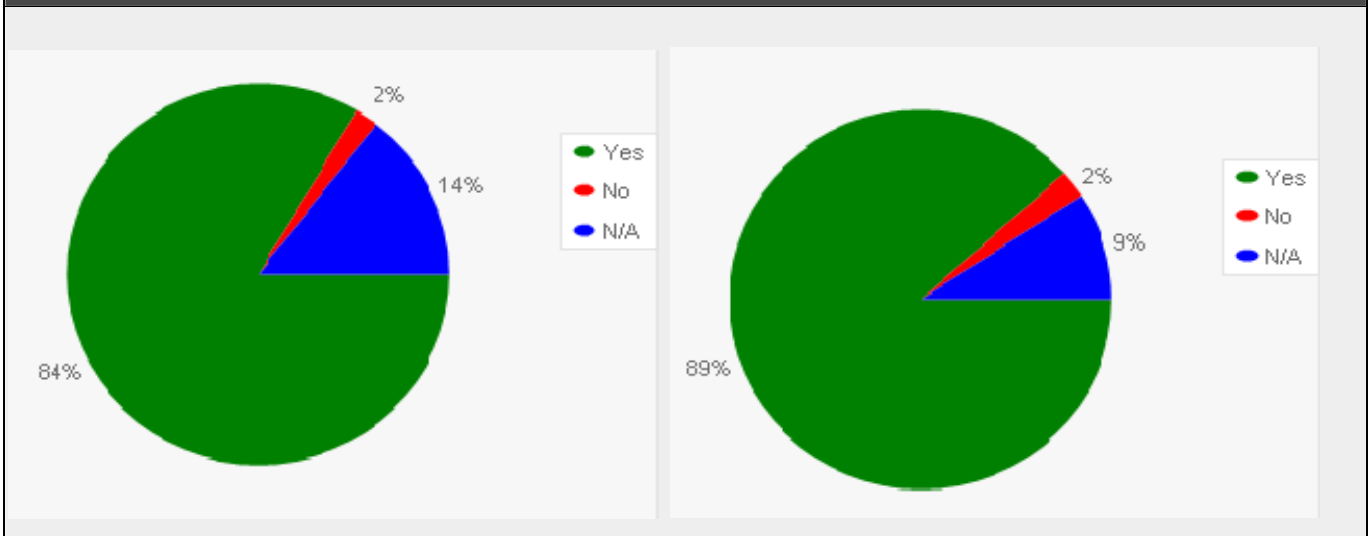
Based on your most recent contact with NGR, how would you rate our call centre staff's level of professionalism?



2006

2007

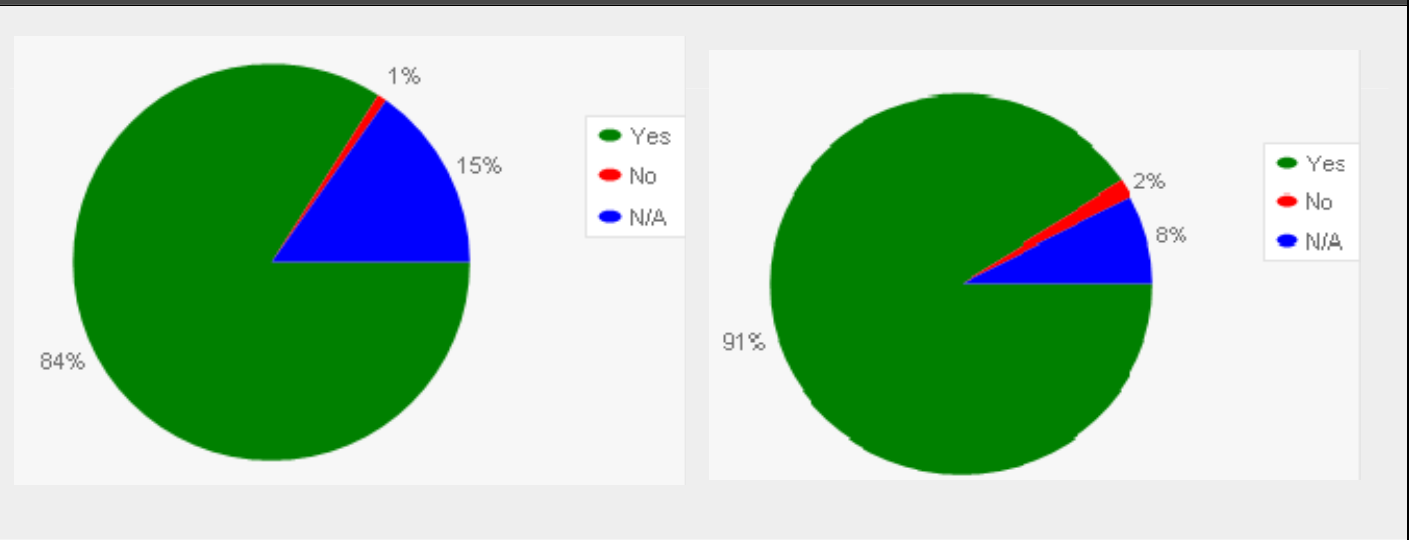
Based on your most recent call to the NGR call centre was your call answered promptly?



2006

2007

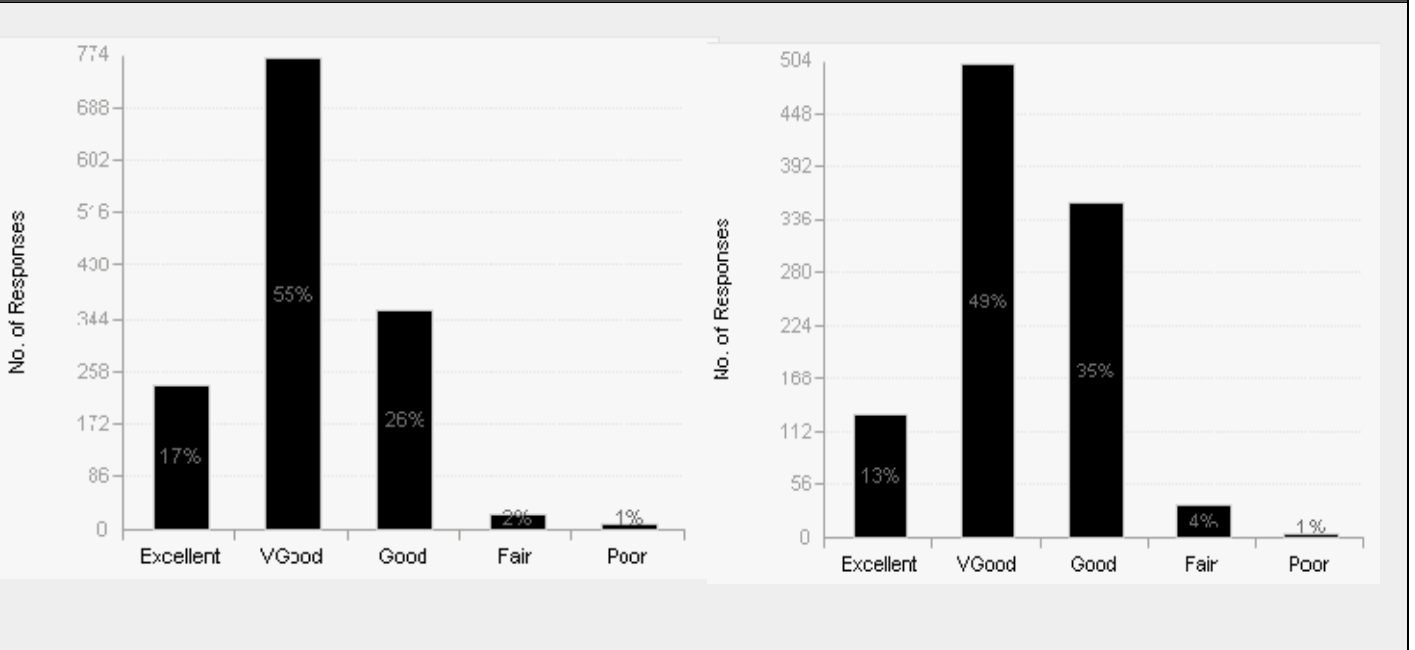
Based on your most recent call to the NGR call centre was your request attended to?



2006

2007

Overall, please rate your satisfaction with NGR's service?



QUANTITATIVE RESULTS – Registered Parties

NGR current strengths identified through recent survey's;

Electronic communication

Most Registered Parties preferred to interact with NGR via the website or email (combined 64%), with phone contact also important (37%). The last survey results (37 / 63), demonstrates a slight tendency toward electronic communication. NGR aims to foster this trend over the coming months by encouraging the use of the constantly improving email and web options. For Registered Parties, the ability to access information and support electronically is very important.

Quick responses and knowledgeable staff

Overall all Registered Parties have high expectations of NGR with 100% rating quick responses (both to phone calls and queries), knowledgeable staff and staff willingness to listen and respond as important, quite important or very important. Of those respondents, over 75% rated their experience against these expectations as either very good or excellent.

Stronger relationships with NGR

While many of the results remain stable (within a few percentage of the results from October 06), NGR overall satisfaction level has improved, with no RP users rating their satisfaction level as poor or fair, that is 100% rating satisfaction with NGR as good, very good or excellent.

This demonstrates that the improved communication and relationship building over the last six months have resulted in an overall better sentiment about interacting with NGR.

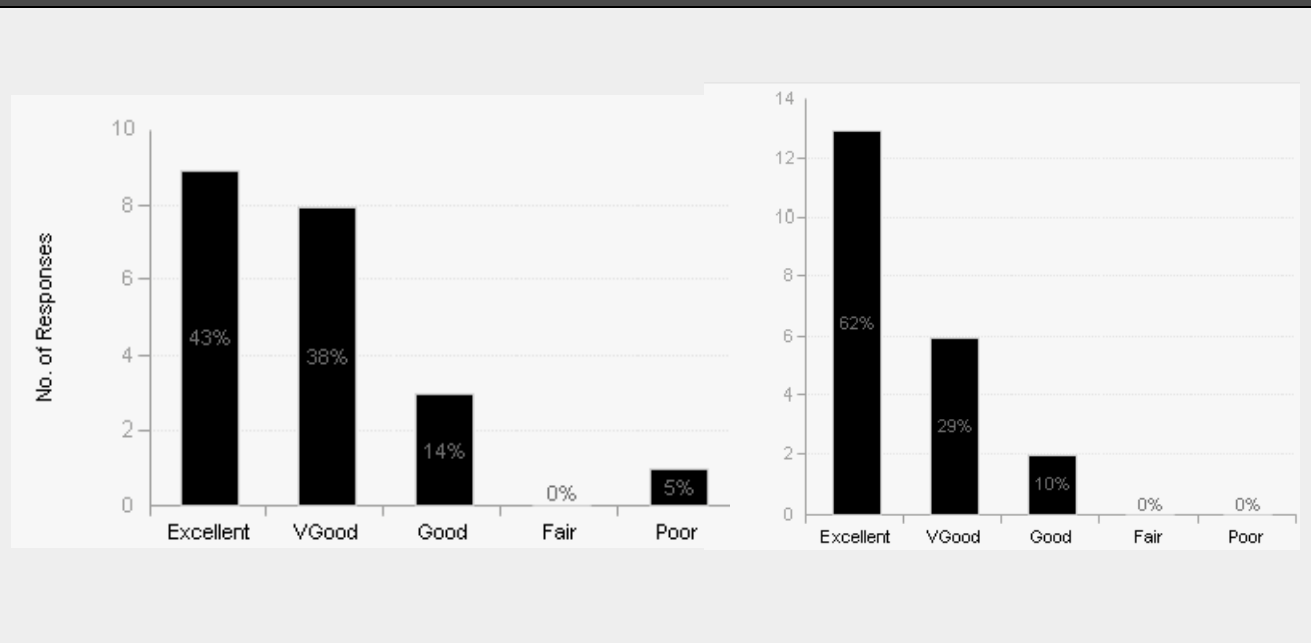
It is important that NGR continue to build these client relationships, as the results can be seen in the overall satisfaction ratings and the individual comments made by RP users.

NGR approval ratings identified through 2006/2007 survey's;

2006

2007

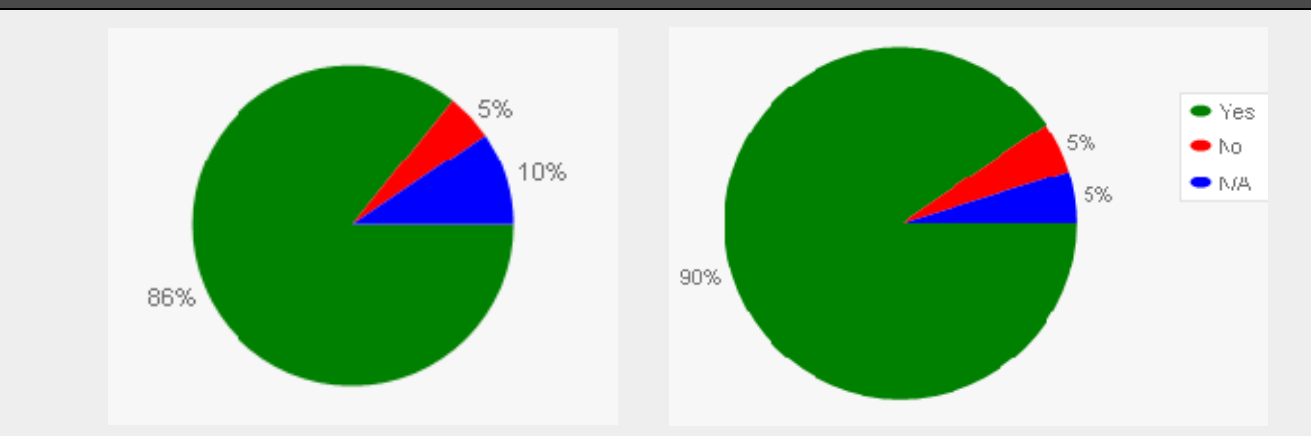
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2006

2007

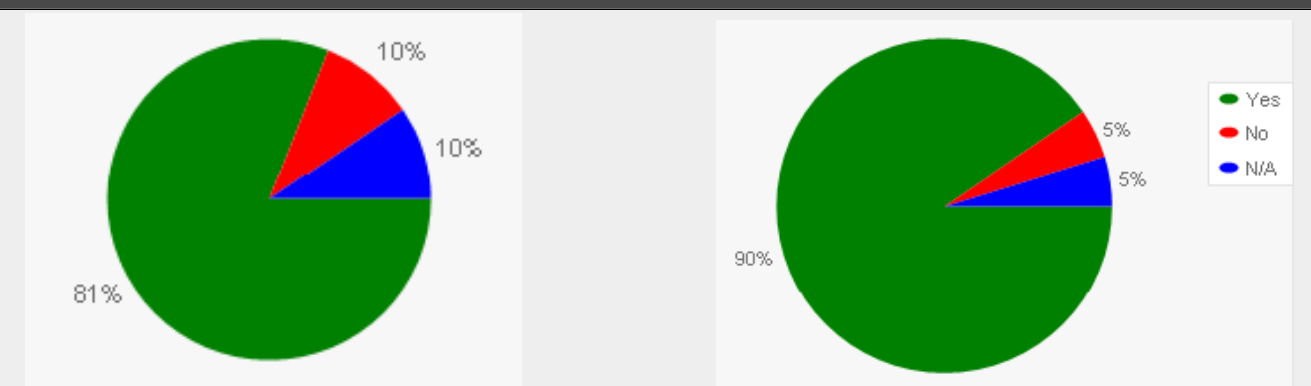
Based on your most recent call to the NGR call centre was your call answered promptly?



2006

2007

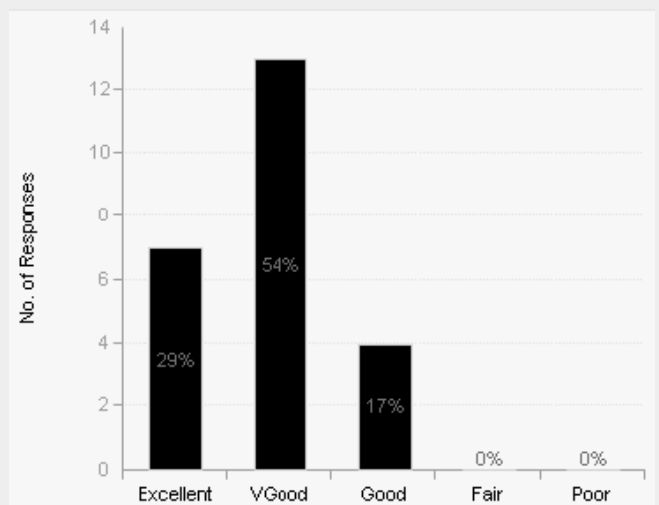
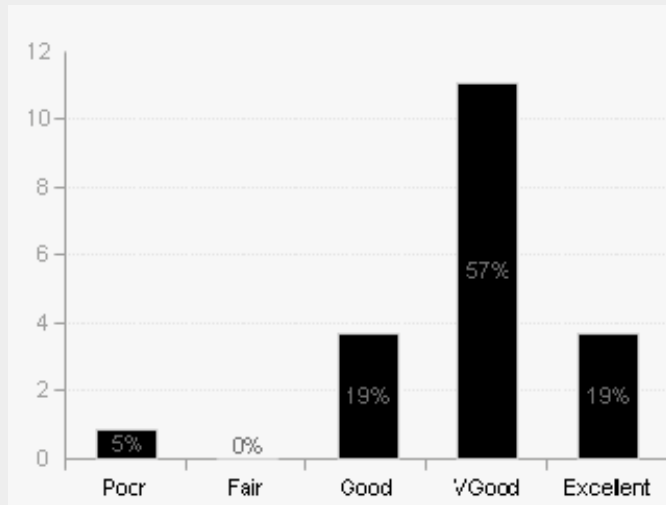
Based on your most recent contact with NGR, was your request attended to satisfactorily?



2006

2007

Overall, please rate your satisfaction with NGR's service?



AREAS OF INTEREST (QUALITATIVE)

Uptake of online access

In June 2007 NGR issued a verification form to 41000 growers with over 60 fields, one of these fields was the option to access the NGR web portal. From this one piece of correspondence with only a small online reference, over 10% of growers registered in less than six months.

As NGR online gives access to bank and business details, this high level of instant uptake indicates that NGR has a solid reputation and a high level of trust amongst grain growers.

Paper-based communication

During the 2007 verification NGR received a record 17 000 verification forms returned along with several hundred new registrations. This high response rate indicates that NGR is preferred and used by the vast majority of Australia

WA uptake

In late 2007 NGR undertook a marketing campaign to WA grain growers to offer (limited) NGR services to these growers. 600 Growers responded to the campaign which is thought to represent ~10% of the total WA market. As this was an entry point for

Complaints

The following table demonstrates NGR's official complaint history from 2004-2007.

	2004 -2005	2005	2006	2007
Registered Parties	1	1	0	0
Growers	160	4	0	0

From a client base of 41000 growers and 185 RP contacts, these results demonstrates extremely high satisfaction rates with NGR's service.

Random Industry Uptake

The NGR number has established it's self as a universal identifier and has recently been used by financial institutes, Organisational databases and other industry functions that whilst are not Registered parties see value in using the NGR numbering system rather than create their own identifier. This presents NGR an integral part of the grains industry data system, over and above NGR's core function.

COMMENTS FROM GROWERS AND REGISTERED PARTIES

Over 1300 comments have been received from growers in 2006-2007. Over 70% of comments were very positive complimentary. 10% of comments were suggestions and areas of potential concerns (e.g. "please don't use recorded messages", a few comments were complaining about the timing of the survey or the nature of the questions or IT problems experienced (<2%) or complaints the NGR system.

To summarise comments from growers it seems that growers were apprehensive about the NGR system at first, but now there is overwhelming support from one card, one database. Growers are happy with the service level provided by NGR and consider the one card system very important to the grains industry. Repeated unsolicited comments have been received expressing a lack of support and negative feelings toward AWB and CBH maintaining independent cards and systems.

26 Comments have been received from Registered Parties via surveys. This client group comments dealt with access speed (15%), data queries (2%). Direct and positive support for NGR via comments was greater than 65%, and only 2 comments were negative against NGR's performance. It is inferred from the results that while some clients raised issues through the comments in relation to one area of NGR's service delivery, that the overall satisfaction rating is still above expectations (refer graphs above).

CONCLUSION

All areas of research and performance measures indicate that NGR has overcome the initial apprehension expressed by industry and growers, and has met the expectations of both parties in terms of service delivery and data functions. NGR's has achieved and exceeded all service standard benchmarks and industry standard benchmarks for accuracy and customer service.

Identified areas for improvement include grower communication and greater customisation for Registered Parties.

The National Grower Register can demonstrate success years of operation providing stable data and high levels of customer service as evaluated by our client groups. NGR can also infer industry acceptance from the wide-ranging manner in which NGR numbers are now utilised, over and above NGR's core function. This evidence indicates to NGR that the one card system could potentially have even greater applications with the agricultural industry.

Further evaluation will take place on an annual basis.

More supporting documentation may be released upon request. Any release will be at NGR's discretion and must be compliant with privacy requirements.

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