

## Agreement & Undertaking:

The objective of the program is to provide quality and comparable data that allows funds to monitor and improve customer satisfaction and experience. As this requires due care and consideration, participants in the CSBA Superannuation CX 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. The fund will 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. Any individual responses will be de-identified unless respondents consent to being identified to the fund for non-commercial purposes only. The fund agrees that any survey data provided (whether respondents are identified or de-identified) will be used for research purposes only and not for marketing or commercial purposes under any circumstances.
10. Any findings from the research which are published are subject to CSBA approval, and the fund must ensure they are not misleading or incorrect and that no individual or entity shall be adversely affected or harmed as a direct result of this information.
11. The fund will not reveal any results or information derived from the survey or program about any other company involved in the survey without the written permission by that company.
12. The fund will be identified to other participating funds in reports and forums where benchmarking of performance is included.
13. This Agreement and Undertaking is to be read in conjunction with [CSBA's Terms and Conditions](#). Where there are any inconsistencies between this Agreement and Undertaking, and CSBA's Terms and Conditions, this Agreement shall prevail.