CSBA SUPERANNUATION EXPERIENCE & ENGAGEMENT BENCHMARK 2026

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 Experience & Engagement Benchmark agree to the following guidelines:

1. Provide a random sample of member 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, age, gender) requested by the agreed date in the specified format. Failure to do so may incur additional fees, which would be discussed and agreed with CSBA and the fund.
2. Contact lists must adhere to CSBA's Program & Data Requirements policy which outlines the key demographic splits of the sample to be provided. This document is provided to registered participants during onboarding.
3. 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.
4. Provide contact details that are current and accurate.
5. Provide a contact list that does not include any members who have asked not to be contacted.
6. Provide contact lists using CSBA's secure file sharing platform ShareFile only. Under no circumstances shall a contact list be sent via email. Any contact lists sent via email will be deleted immediately, sender will be notified and CSBA's Privacy Officer will be notified of the breach and will escalate as required.
7. Where unusable contacts are provided, or if additional sample is required, provide replacement contacts in a timely fashion. In the event of lower-than-expected survey response rates and where there is no further sample available, or the sample has been fully exhausted, CSBA reserves the right to relax or remove segment level data collection quotas or restrictions if applicable to maximise the number of completed responses. In this case, CSBA would notify the fund accordingly.
8. Communicate to the internal organisation and contact centre that the survey is being conducted and its purpose. It is also strongly recommended that notification of the research being conducted is disclosed on the Participant's website.
9. Where feasible, the fund will assist by notifying member contacts of the survey taking place to legitimatise the research and encourage survey participation.
10. Provide a person within the organisation who can be contacted in the event of any queries or issues arising from members.
11. Provide CSBA with any information that may impact the integrity of the survey in a timely fashion.

12. Survey results are to be used for internal 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 only be used for internal research purposes and not for any other purpose, including marketing or commercial purposes under any circumstances.
13. Any findings from the research which a fund or its partners/associated entities wish to publish requires prior written approval (of the content and medium in which it is to be published) from CSBA. Any content or data published may not be misleading or incorrect and no comparisons with other individual entities or entity participating in the Benchmarking Program may be made or claimed, and published information shall not adversely affect or harm any entity as a direct result of this information.
14. 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.
15. The fund will be identified to other participating funds in reports and forums where benchmarking of performance is included.
16. Fees shall be invoiced and payable prior to the start of survey fieldwork. Where multiple waves are included in the program registration, fees will be invoiced proportionately according to the number of waves the fund is registered for. A refund or credit of 50% will be provided for withdrawal from the program received in writing, only with more than 90 days' notice prior to interviewing (start of fieldwork).
17. Program pricing is based on a syndicated approach. Additional or ad hoc client requests for variations to any element of the survey (including but not limited to the questionnaire introduction, closing statement, questions), analysis, and reporting (including interim reporting) outside of the standard program, will incur additional fees, to be discussed and agreed between CSBA and the fund, prior to any additional work taking place.
18. To ensure this syndicated program remains relevant and offers a best practice benchmarking program for the Superannuation industry, CSBA may at times review the approach and modify elements of the methodology in line with industry and research trends. Such changes and any potential impact on coverage or comparability of results would be communicated in advance with the fund.
19. 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.