

Public Trustee Client Satisfaction Research

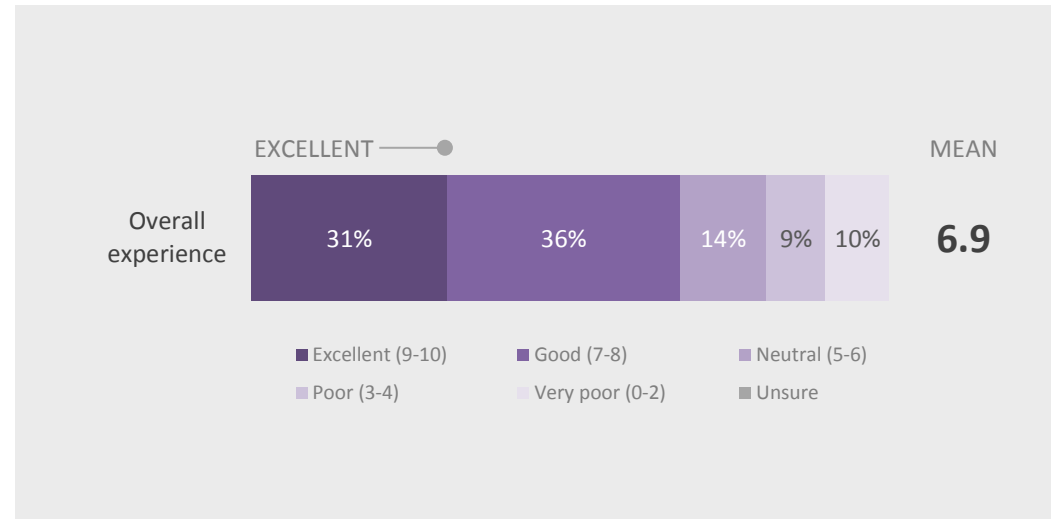
Quantitative Tracking Research Report
December 2019



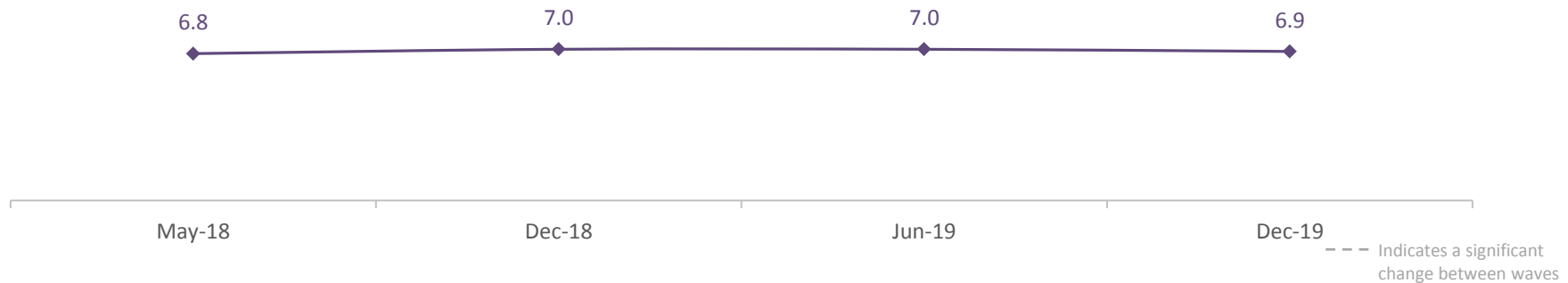
BENEFICIARIES OF DECEASED ESTATES

OVERALL EXPERIENCE

Satisfaction with the overall experience has remained stable. Positively, two-thirds of beneficiaries of a deceased estate (67%) rate their overall experience with the Public Trustee as good to excellent.



OVERALL EXPERIENCE MEAN OVER TIME



Base: All beneficiaries of deceased estate respondents (May-18 n=100, Dec-18 n=150, Jun-19 n=141, Dec-19 n=140)

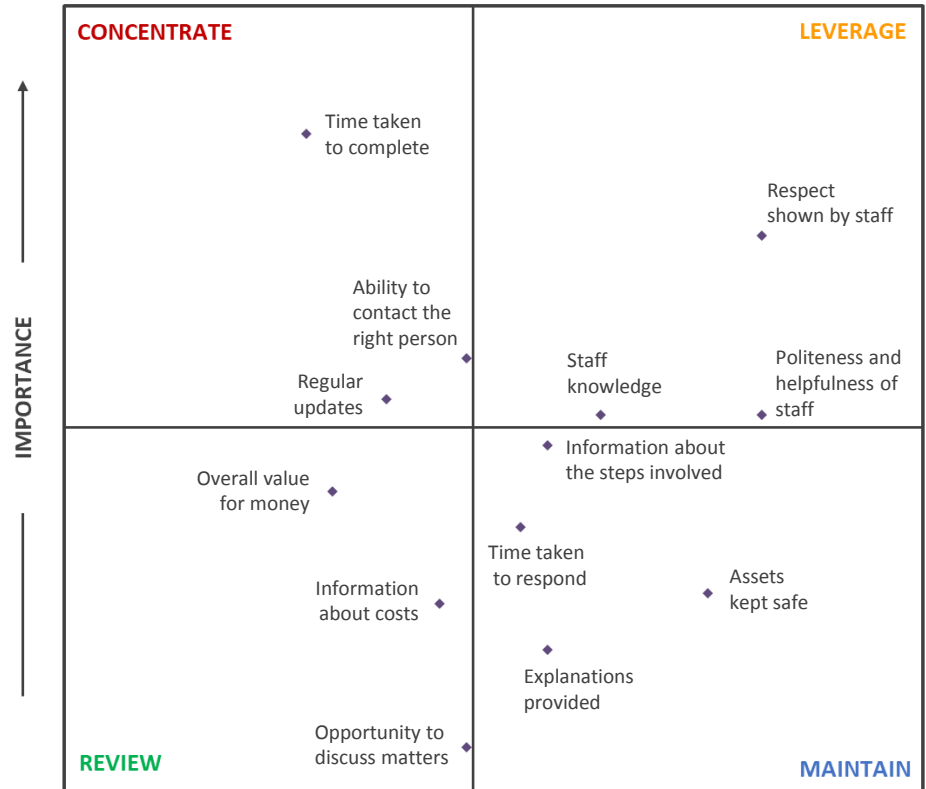
Q3. On a scale of 0 to 10 where 0 is poor and 10 excellent, based on your experience overall, how would you rate the Public Trustee's Estate Administration Service?

DRIVERS OF SATISFACTION

The ‘time it takes to complete the process’, the ‘ability to contact the right person’, and ‘providing regular updates’ fall within the concentrate quadrant. Focusing on these areas will have an impact on improving the overall experience.

In comparison to the previous wave:

- ‘Time taken to respond’ has moved in a positive direction, from review to maintain.
- ‘Ability to contact the right person’ has regressed from maintain to concentrate.
- ‘Opportunity to discuss matters’ has regressed from maintain to review.
- ‘Information about the steps involved’ has slightly declined in importance, moving from leverage to maintain.
- ‘Politeness and helpfulness of staff’ and ‘staff knowledge’ have slightly increased in importance, moving from maintain to leverage.



This graph plots each attribute on their performance (horizontal axis) and importance (vertical axis) relative to other aspects in order to determine which require the most consideration.

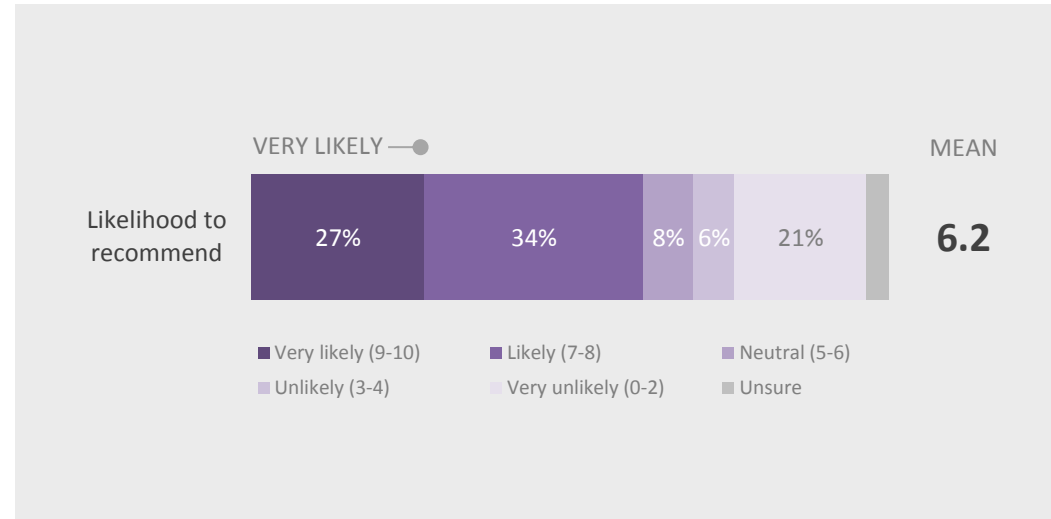
Key focus should be on the **concentrate** quadrant where there is high to moderate impact on overall satisfaction, but performance is at a lower level relative to other areas.

	PERFORMANCE →	
<p>CONCENTRATE High importance, low performance <i>Primary priority for improvement</i></p> <p>REVIEW Low importance, low performance <i>Secondary priority for improvement</i></p>	<p>LEVERAGE High importance, high performance <i>Promote strong performance</i></p> <p>MAINTAIN Low importance, high performance <i>Maintain good performance</i></p>	

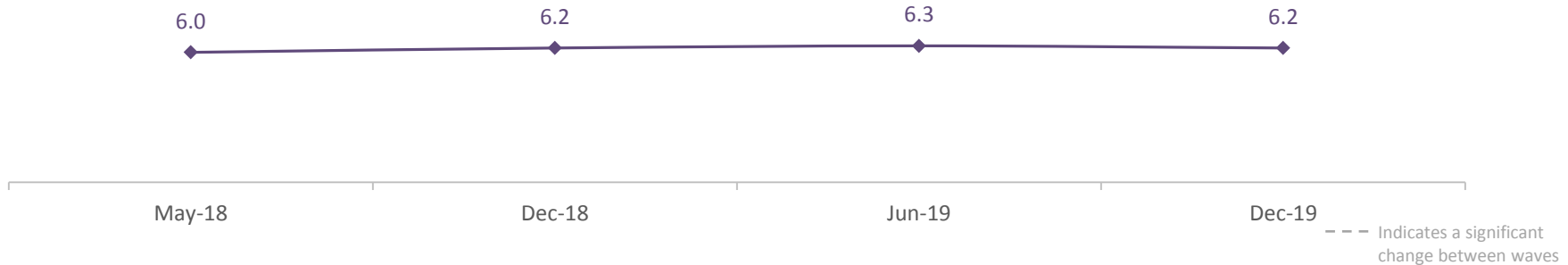
Base: All beneficiaries of deceased estate respondents (Dec-19 n=140)
Q2. Which of these factors is the most important to you?

LIKELIHOOD TO RECOMMEND

Around two-thirds (61%) are likely to recommend the Public Trustee. The likelihood to recommend has remained stable since May-18.



LIKELIHOOD TO RECOMMEND MEAN OVER TIME



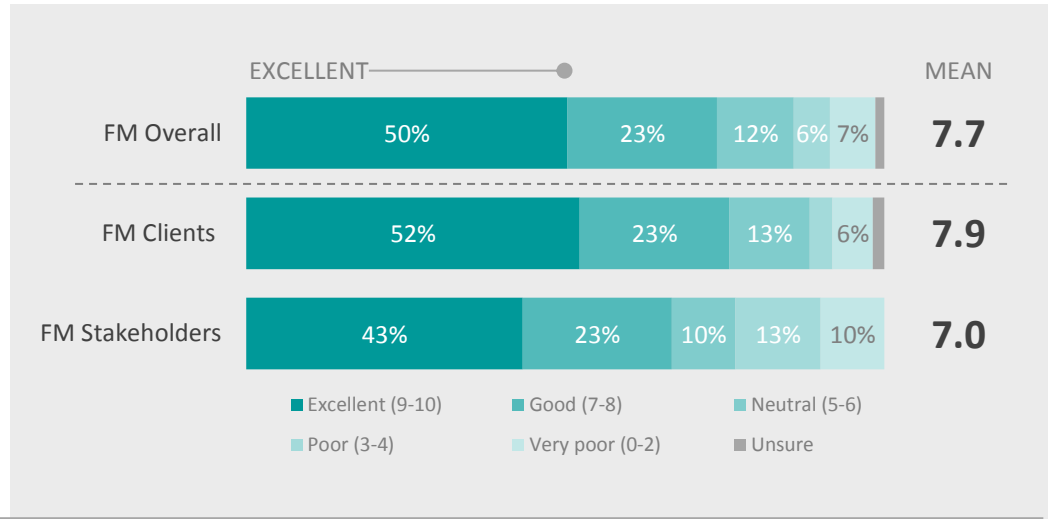
Base: All beneficiaries of deceased estate respondents (May-18 n=100, Dec-18 n=150, Jun-19 n=141, Dec-19 n=140)

Q5. On a scale of 0 to 10 where 0 is very unlikely, and 10 is very likely, how likely would you be to recommend the Public Trustee's Estate Administration Service?

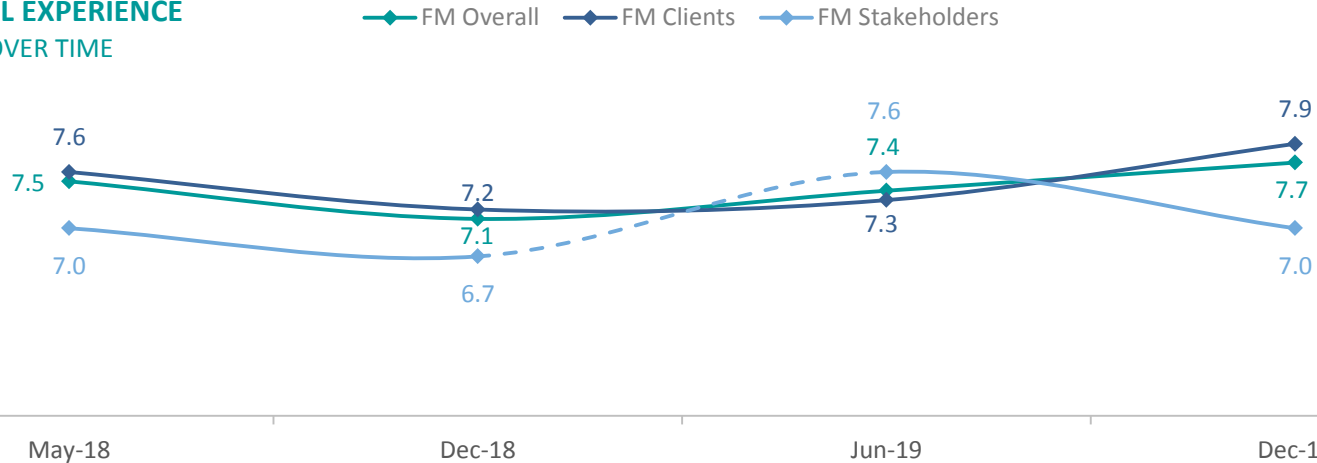
FINANCIAL MANAGEMENT SERVICES

OVERALL EXPERIENCE

Overall, satisfaction with the experience has remained stable. Approximately 3 in 4 people who use the Financial Management Service (73%) rate their overall experience as good to excellent.



OVERALL EXPERIENCE MEANS OVER TIME



Base: All financial management client respondents (FM Overall May-18 n=100, FM Overall Dec-18 n=105, FM Overall Jun-19 n=140, FM Overall Dec-19 n=141; FM Clients May-18 n=50, FM Clients Dec-18 n=80, FM Clients Jun-19 n=110, FM Clients Dec-19 n=111; FM Stakeholders May-18 n=50, FM Stakeholders Dec-18 n=25, FM Stakeholders Jun-19 n=30, FM Stakeholders Dec-19 n=30)
 Q3. On a scale of 0 to 10 where 0 is poor and 10 excellent, based on your experience overall, how would you rate the Public Trustee’s Financial Management Service?

DRIVERS OF SATISFACTION

The ‘politeness and helpfulness of staff’, ‘respect shown’, ‘ability to contact the right person’, ‘staff knowledge’, ‘the budget put in place’, and ‘making sure assets and/or money are safe’ fall within the leverage quadrant. These attributes can be promoted as positive elements of the Public Trustee.

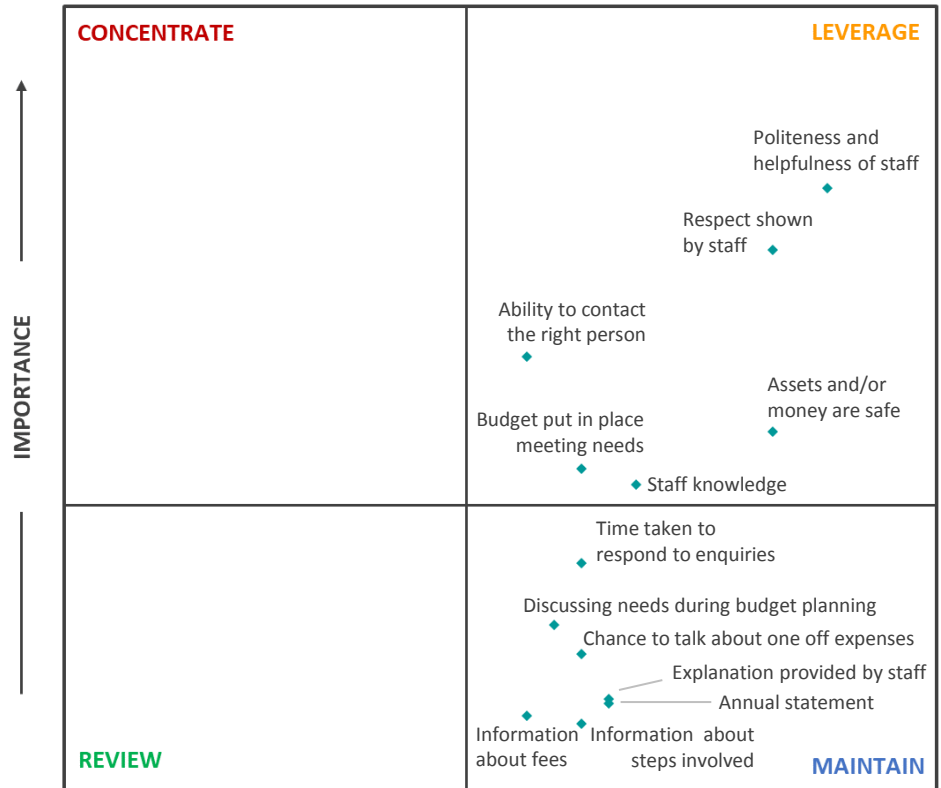
In comparison to the previous wave:

- ‘Explanation provided by staff’, ‘information about steps involved’, and ‘information about fees’ have moved in a positive direction, from review to maintain.
- ‘Staff knowledge’ has slightly increased in importance, moving from maintain to leverage.
- ‘Chance to talk about one off expenses’, and ‘time taken to respond to enquiries’ has shifted from concentrate to maintain.

These shifts are mainly the result of increases in satisfaction scores.

This graph plots each attribute on their performance (horizontal axis) and importance (vertical axis) relative to the other aspects in order to determine which require the most consideration.

*Key focus should be on the **concentrate** quadrant where there is high to moderate impact on overall satisfaction, but performance is at a lower level relative to other areas.*



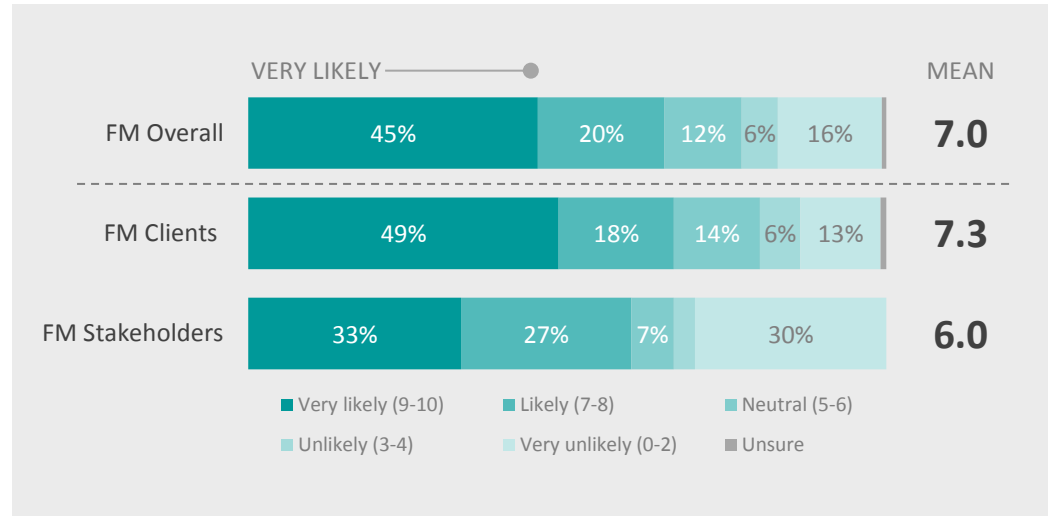
PERFORMANCE →	
<p>CONCENTRATE High importance, low performance <i>Primary priority for improvement</i></p> <p>REVIEW Low importance, low performance <i>Secondary priority for improvement</i></p>	<p>LEVERAGE High importance, high performance <i>Promote strong performance</i></p> <p>MAINTAIN Low importance, high performance <i>Maintain good performance</i></p>

Base: All financial management respondents (Dec-19 n=141)
Q2. Which of these factors is the most important to you?

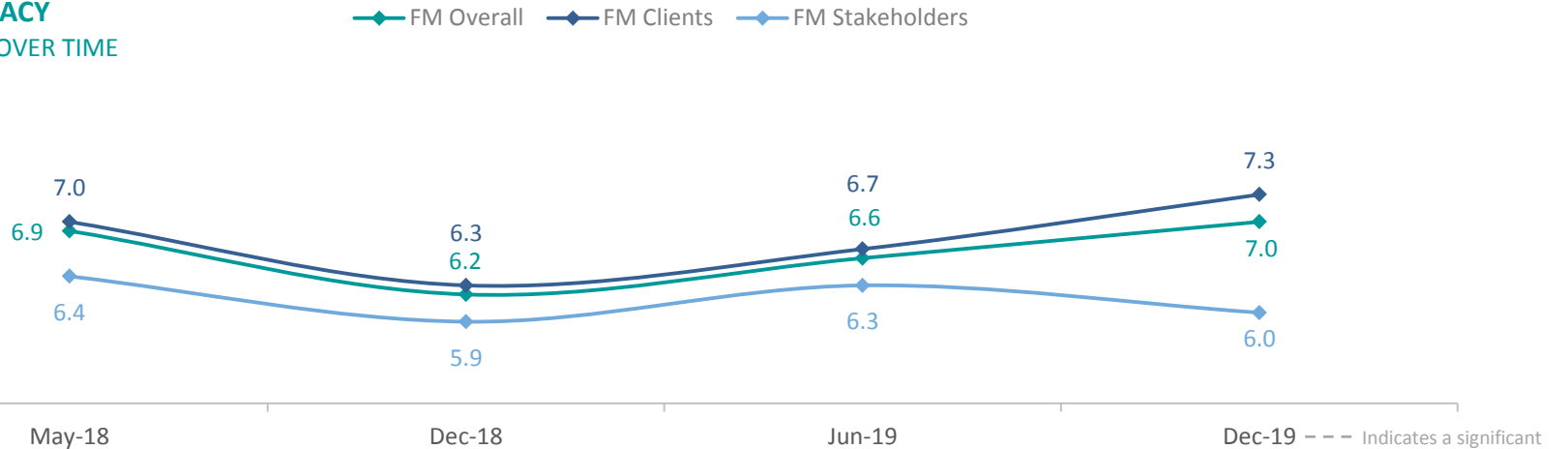
ADVOCACY

At an overall level, the likelihood of people who use the Financial Management Service speaking well of the Public Trustee has seen a slight increase this wave, but not significantly.

Due to the small sample size, the probability of changes between waves being found to be statistically significant is reduced.



ADVOCACY MEANS OVER TIME



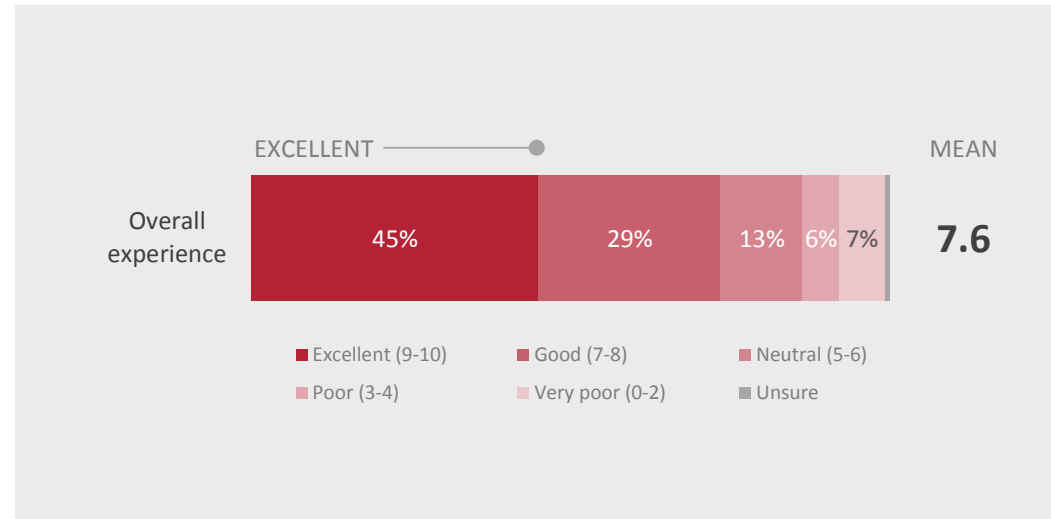
Base: All financial management client respondents (FM Overall May-18 n=100, FM Overall Dec-18 n=105, FM Overall Jun-19 n=140, FM Overall Dec-19 n=141; FM Clients May-18 n=50, FM Clients Dec-18 n=80, FM Clients Jun-19 n=110, FM Clients Dec-19 n=111; FM Stakeholders May-18 n=50, FM Stakeholders Dec-18 n=25, FM Stakeholders Jun-19 n=30, FM Stakeholders Dec-19 n=30)

Q7. Assuming the Public Trustee came up in conversation, how likely are you to speak well of the Public Trustee to friends and family?

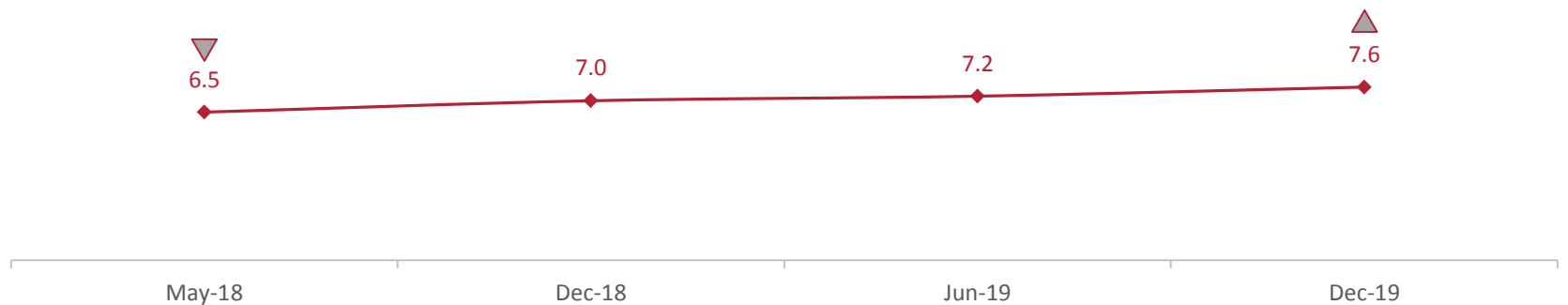
BENEFICIARIES OF A TRUST

OVERALL EXPERIENCE

Over the past 18 months, Trust Beneficiaries' satisfaction with their overall experience has significantly increased. This wave, 3 in 4 (74%) rate their overall experience as good to excellent.



OVERALL EXPERIENCE MEAN OVER TIME



--- Indicates a significant change between waves
 ▼ ▲

Base: All trustee respondents (May-18 n=100, Dec-18 n=101, Jun-19 n=140, Dec-19 n=140)

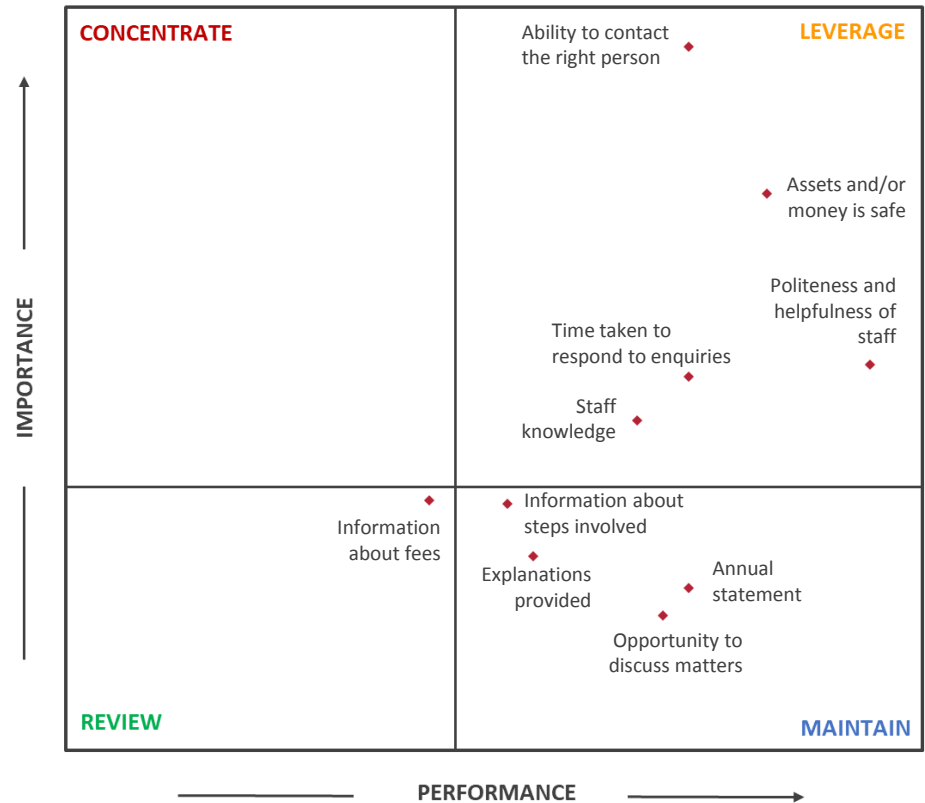
Q3. On a scale of 0 to 10 where 0 is poor and 10 excellent, based on your experience overall, how would you rate the Public Trustee as a trustee?

DRIVERS OF SATISFACTION

The ‘ability to contact the right person’, ‘staff knowledge’, ‘time taken to respond to enquiries’, ‘politeness and helpfulness of staff’, and ‘assets and/or money is safe’ fall within the leverage quadrant. These attributes can be promoted as positive elements of the Public Trustee.

In comparison to the previous wave:

- ‘Information about fees’ has slightly declined in importance, moving from concentrate to review.
- ‘Information about steps involved’ has moved in a positive direction, from review to maintain.
- ‘Explanations provided’ has slightly declined in importance, moving from leverage to maintain.



This graph plots each attribute on their performance (horizontal axis) and importance (vertical axis) relative to the other aspects in order to determine which require the most consideration.

Key focus should be on the **concentrate** quadrant where there is high to moderate impact on overall satisfaction, but performance is at a lower level relative to other areas.

CONCENTRATE
 High importance, low performance
Primary priority for improvement

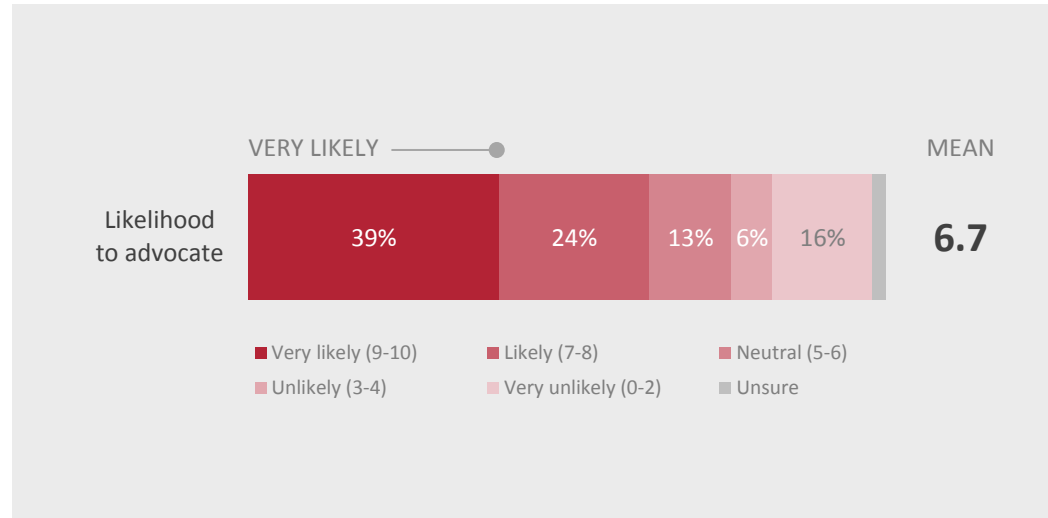
REVIEW
 Low importance, low performance
Secondary priority for improvement

LEVERAGE
 High importance, high performance
Promote strong performance

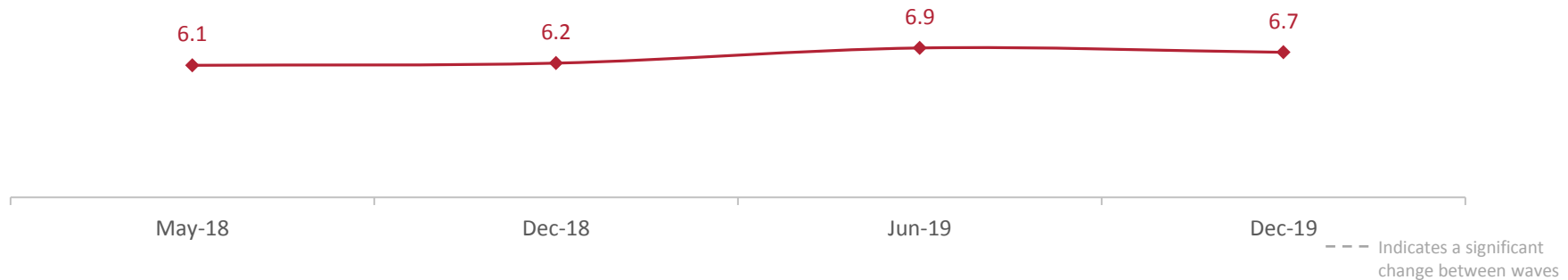
MAINTAIN
 Low importance, high performance
Maintain good performance

ADVOCACY

The likelihood of trust beneficiaries to speak well of the Public Trustee has remained stable since May 2018. Two-thirds (63%) are likely to speak well of the Public Trustee.



ADVOCACY MEAN OVER TIME



Base: All trustee respondents (May-18 n=100, Dec-18 n=101, Jun-19 n=140, Dec-19 n=140)

Q7. Assuming the Public Trustee came up in conversation, how likely are you to speak well of the Public Trustee to friends and family?



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