

Client Satisfaction Policy

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Related policies and guidance

- Create and Evaluate Quality Assurance Policy
- Create and Evaluate Business Continuity Plan
- Create and Evaluate Privacy Policy
- Australian Evaluation Society Code of Ethics:
www.aes.asn.au/join-the-aes/membership-ethical-guidelines/7-aes-codes-of-behaviour-ethics.html
- International Association for Public Participation (IAP2) Code of Ethics:
www.iap2.org.au/About-Us/About-IAP2-Australasia-/Code-of-Ethics/
- International Association of Facilitators Statement of Values and Code of Ethics:
<https://www.iaf-world.org/site/professional/iaf-code-of-ethics>

Our goal for client satisfaction

Create and Evaluate is firmly committed to quality and timely service delivery.

Our goal is 100% client satisfaction for 100% of the work we do.

Our principles

- We acknowledge that each client has different needs, different ways of doing things and different expectations. One size does not fit all.
- We consistently ask ourselves, “Where can we add value? What can we do to make our client’s work better?”
- We follow through on every commitment, every time. We do what we say we will do.
- Working with us should not be an inconvenience to our client. We will fit in with our client’s systems and processes. We will ensure that there is a balance between communication/information flow and demands on our client’s time.
- Our engagement with our client doesn’t end when the job ends. They remain a valued part of our network and we continue to support them wherever possible in future, e.g. connecting them with useful contacts, informing them about relevant opportunities we come across that may interest them, etc.

Our actions

- We adhere to the price schedule and terms and conditions of the contract or written quote agreed to at the start of the engagement.
- Contract deliverables and associated payment milestones are generally based on **client acceptance** of the work, rather than simply completion of the work.
- We clarify client expectations around deliverables, deadlines, quality, risks and potential issues at the start of each engagement. This is done face-to-face or by phone/video, to encourage rapport and minimise the risk of miscommunication.
- Expectations around information flow are agreed with our client at the start of the project, and monitored continually throughout the engagement to ensure that communication with client contact officers and any other collaborators remains timely and effective.
- We keep our clients informed about progress through informal day-to-day communication, as well as mid-point reviews and formal reporting. We submit any formal progress reports on time and to the standard required.
- We respond to all client queries within 24 hours. Clients have direct access to our Principal Consultant for quick resolution of queries or concerns.

- We proactively keep our client informed of any emerging risks or concerns. Should our services be discontinued for any reason, we follow the procedure outlined in this policy, including a focus on client needs and value for money.
- Sub-contractors are only used with the approval of our client. We remain fully responsible for the quality of delivery provided by any sub-contractors we engage.
- We adhere to any rules and expectations set by our client around the use of logos, marketing, public relations, media relations, etc.
- We adhere to any legislative, regulatory and policy requirements applicable to our client, e.g. storage and handling of personal information, IT security, WHS, etc.
- We seek regular feedback from our clients through informal and formal processes.
- We adhere to professional standards, including those set by the Australian Evaluation Society (AES), International Association for Public Participation (IAP2) and International Association of Facilitators (IAF), consistent with our Quality Assurance Policy.
- We support our client to achieve any environmental management targets they may have, e.g. targets for sustainability, green practices or sustainable procurement.

Discontinued services

Create and Evaluate reserves the right to discontinue services if:

- an unsafe condition arises, e.g. an area being affected by a contagious disease or natural disaster, an unsafe work site.
- an unforeseen or unavoidable event occurs outside our control, e.g. pandemic, extreme weather event.
- terms and conditions of the signed quote or contract are not met by the client. This includes non-payment of invoices.

Before services are discontinued:

- The Principal Consultant will promptly discuss the situation with the client contact. Wherever possible, Create & Evaluate will propose options to enable services to continue. Where options involve additional cost, time, postponement or contracting to another provider, this will be clearly communicated to the client.
- Client needs, value for money, and workplace health and safety will be the key criteria in determining options for continuation of service.

- Options for continuation of service must be agreed to by both Create and Evaluate and the client.

In the event that services are discontinued (not postponed):

- Create and Evaluate will inform the client in writing, including the date of cessation of services and arrangements for any refunds to the client if required.
- If Create and Evaluate has chosen to discontinue services, any work that has been paid for by the client but not yet completed will be refunded, minus an amount to cover any consultant time on spent on the project so far.
- If the client has chosen to discontinue services due to change of mind, any initial deposit paid by the client is non-refundable.
- Any payments made to Create and Evaluate for work already completed are non-refundable.

The above conditions will be made clear in any written quotes or contracts agreed to by the client at the start of the engagement.

Our complaints procedure

Create and Evaluate will take all reasonable steps to cooperate with the client in the event of a complaint about our services. We view complaints as a valuable opportunity to improve our services and performance. All complaints will be dealt with according to consumer guarantees under Australian Consumer Law.

All complaints are to be addressed to the Principal Consultant, Renée Madsen, at renee@createandevaluate.com.au or by phone 0413 889 604. Where the client is not comfortable raising the complaint with the Principal Consultant directly, Create and Evaluate may engage a third party to help resolve the situation and provide a fair process for all concerned.

All complaints will be responded to within 24 hours, either to address the complaint fully, or to reassure the person making the complaint that we have received their correspondence and inform them of next steps in the investigation process.

Our complaints process requires the following details for each complaint to be recorded and kept on file. All personal information will be treated in accordance with our Privacy Policy:

- Name of person making the complaint.
- Date of complaint.
- Nature of complaint, including details of the incident, location, date, time and witnesses.
- What action the person making the complaint would like to see to resolve the situation.
- Any concerns the person making the complaint may have regarding release of their identity and/or information they provide during the investigation process.
- Follow up actions taken by Create and Evaluate to investigate the complaint.
- Final outcome of the investigation. This will be communicated to the client as soon as possible.

Policy updates and enquiries

This policy will be reviewed regularly and is available on our website:

<https://www.createandevaluate.com.au/aboutus/policiesandfaqs/>

Queries about this policy may be directed to Principal Consultant Renée Madsen at:

renee@createandevaluate.com.au or phone 0413 889 604.

This policy was last updated in March 2020.