



Customer Satisfaction Survey Results

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Survey Purpose

- Gain better understanding of customer needs
- Identify areas of needed improvement
- Establish baseline to measure future progress



Timeline and Process

- 2013 Q4
 - RFP for contractor
 - Selected Rockbridge Associates
 - Qualitative interviews with customers
- 2014 Q1
 - Open survey to customers
- 2014 Q2
 - Report survey results
 - Establish and implement plan to improve customer service
- 2015 Q3
 - Tentative timeframe for second open survey



Survey Promotion

- ARIN announcement
- TeamARIN blog
- Announcement at NANOG meeting
- Social media
- Email to all points of contact who have recently conducted transactions with ARIN

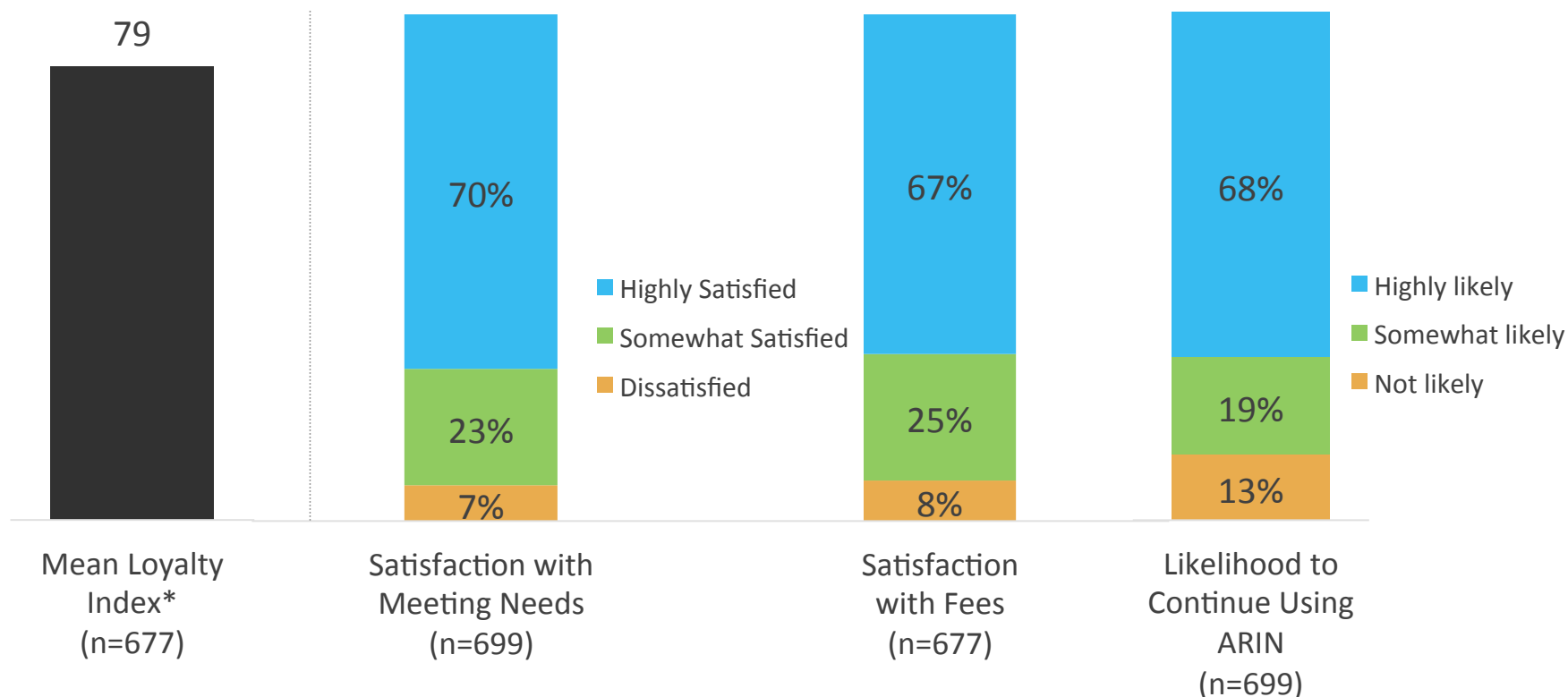
Background & Methodology

- This report provides results to a survey of ARIN members, customers, and community. An online survey was conducted between February 10 and February 25, 2014.
- 699 individuals participated in the survey, and have the following relationships with ARIN:
 - 324 – Has a direct allocation of IP addresses (IPv4, IPv6) from ARIN, and is a member.
 - 353 - Has a direct assignment of Internet number resources (IPv4, IPv6, ASN) from ARIN.
 - 16 - Has no direct Internet number resources from ARIN, but uses some ARIN services.
 - 6 - Has no direct Internet number resources from ARIN, and does not use ARIN services, but is part of the ARIN community.
- The median survey time was 18 minutes.
- The margin of sampling error at a 95% level of confidence for aggregate results is +/- 3%. The margin of error is larger for subgroups of the data.
- The Mean Loyalty Index is a derived measure that takes satisfaction with meeting needs, satisfaction with value, and likelihood to continue ARIN into account. The three measures factor into the index equally (each accounting for a third). A score of “100” means perfect scores were received for each component of the index.

ARIN does a good job meeting the needs of its community; seven in ten are satisfied that the organization is meeting needs.

- Larger companies (over 100 employees) are more satisfied with ARIN.
- Non-ISPs are more satisfied with the fees they pay (69% compared to 60% of ISPs).

Overall Loyalty Metrics



*Combines satisfaction with meeting needs, satisfaction with value, and likelihood to continue using equally into one measure

Q1. Thinking about your interactions with ARIN and the products and services it provides, how satisfied are you with ARIN in meeting your organization's needs?

Q2. How satisfied are you with the value you receive from ARIN based on the fees you pay?

Q3. If you had the option to choose another registry services provider, how likely would you be to continue using ARIN services?

Highly satisfied community members say their experiences have been positive and easy. Those with lower satisfaction cite difficulty working with ARIN to meet their business needs.

Reasons for High Overall Satisfaction

(6 or 7 on 7-point Satisfaction Scale)

"I have been very please with my interactions with them."

"I believe ARIN has organized IP allocations in the correct manner."

"No problems with getting what I need done. I gave it a 6 instead of a 7 for the learning curve/ complexity involved."

"There is a lot of paperwork and the website can feel like a maze. But they are fair about their assignments and the people are very helpful."

"Recent updates to web management of IP space was a huge improvement over the early 2000's and resources for information."

"Good online tools. Minimal interaction required."

"I needed some help within the last couple months to sort out some legacy problems and your support exceeded my expectations in getting this resolved."

Reasons for Low Overall Satisfaction

(1 or 2 on 7-point Satisfaction Scale)

"In my attempt to receive an IPv6 allocation, I ran into a bureaucratic nightmare that effectively prevented me from receiving an allocation."

"Every time I try to make any changes through ARIN the bureaucracy is just insane. No one can explain how to perform the simplest of requests."

"We have several legacy IP addresses from 10+ years back and trying to get them updated with our new Organizational name has been such a challenge that we have just left it alone. Very difficult to get records updated and transfer process/form old/cumbersome."

"Instead of helping new ISP startups (especially VPS providers), ARIN is currently effectively making everything to make growth a very painful process. This makes absolutely no sense, especially considering that ARIN is funded by the same businesses."

"Your pursuit of your policies is discriminatory against small business."

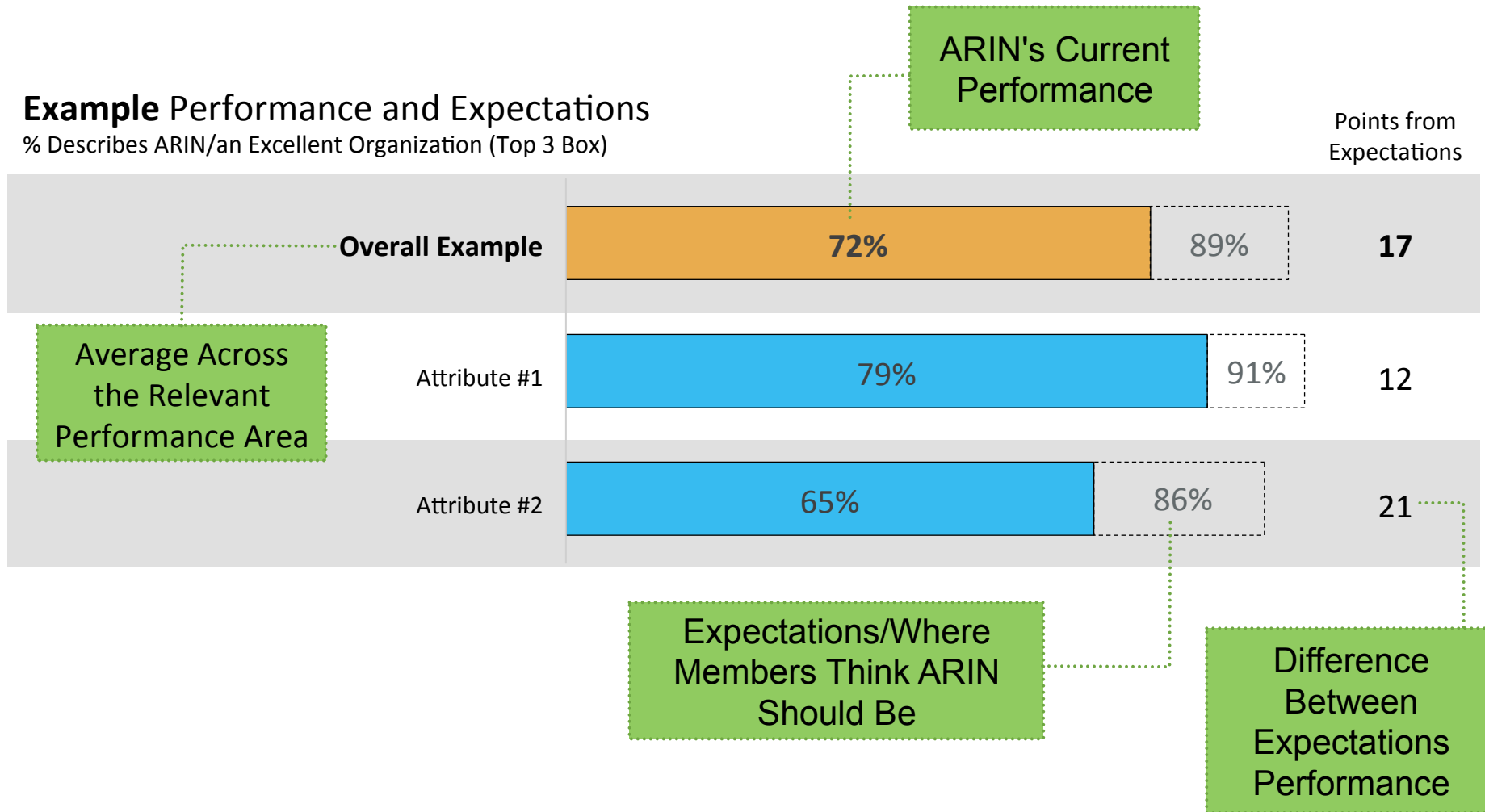
Overview of How Performance and Expectation are Measured

- A scorecard was developed by capturing perceived performance and expectation on 33 specific attributes grouped into 8 dimensions: Policy Development (6 items), Registration Services (5), Engineering (4), Financial Services (2), Communications/ Outreach (6), ARIN Meetings (3), Customer Service (5), and Internet Governance (2).
- For each of the 33 items, community members were asked two questions:
 - 1) Performance: How well does this describe ARIN? (Scale of 1 to 10)
 - 2) Expectation: How well does this describe an “excellent” Internet Number Registry organization? (same scale)
- Actual success is defined as the gap between Expectation and Performance. In the long run, ARIN should focus on closing gaps to come as close as possible to (or even exceeding) expectations of community members.
- In its planning, ARIN should focus on gaps on individual items as well as the aggregate for each of the eight dimensions.
- The following pages report the scorecard results, starting with the high level view across the 8 dimensions.

How to Read Scorecard Results

Example Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)



*Note: data not real

Q4. The following is a list of features you may expect from ARIN or a professional organization with a similar purpose. For each feature below, please provide two ratings: 1) ARIN's performance: rate how well each feature describes ARIN, 2) Your expectation: rate how well each feature describes an "excellent organization" with the same mission as ARIN (realizing that you may not expect even an excellent organization to be a perfect "10" on everything).

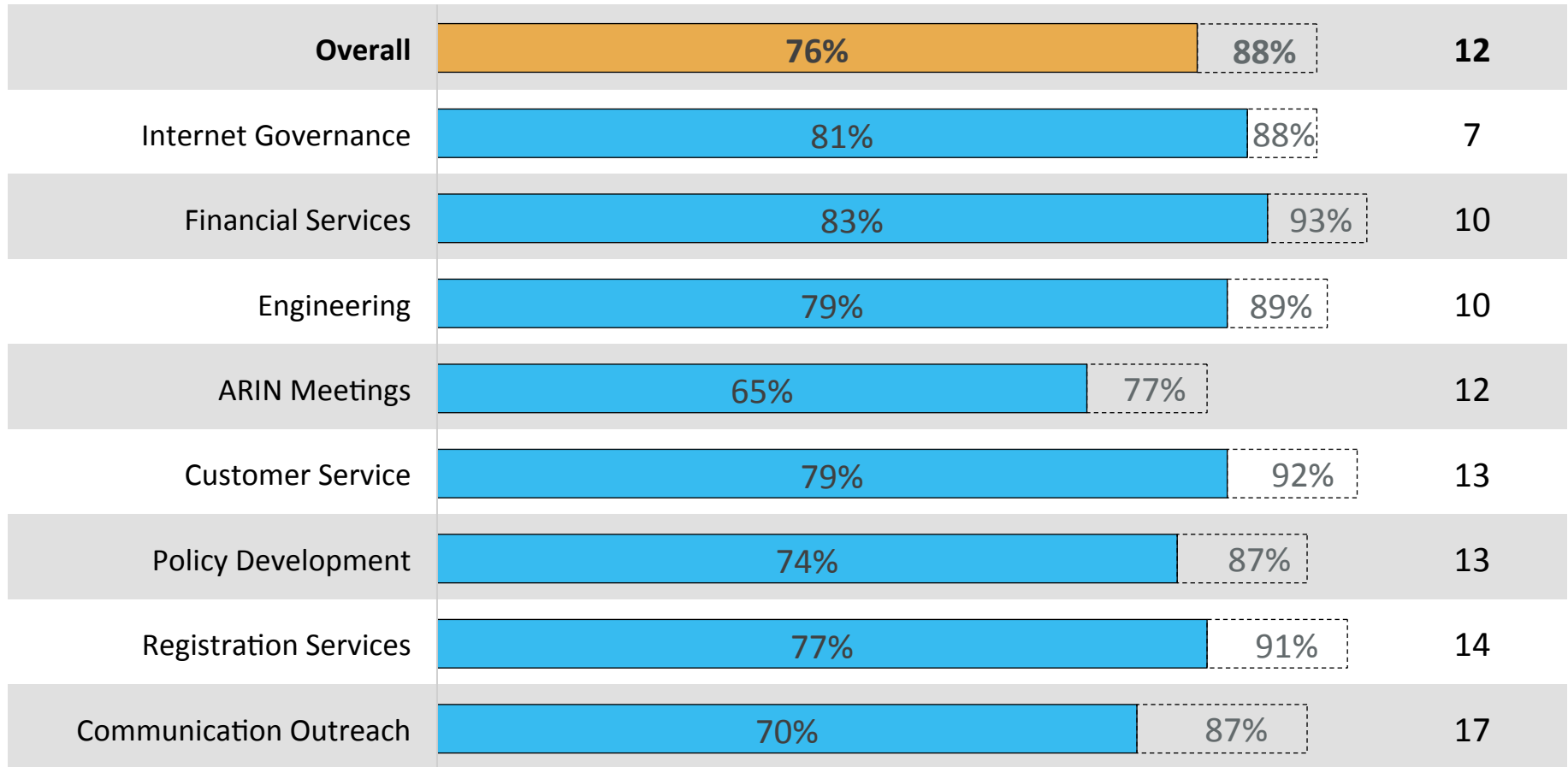
----Dashed lines show expectations

Based on community expectations, there is some room for improvement on all of ARIN's service dimensions. ARIN does the best job (smallest gaps) meeting expectations on Internet Governance, Engineering and Financial Services. The greatest improvement opportunity lies in Communications/Outreach, where expectations are high but performance low.

Overall Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



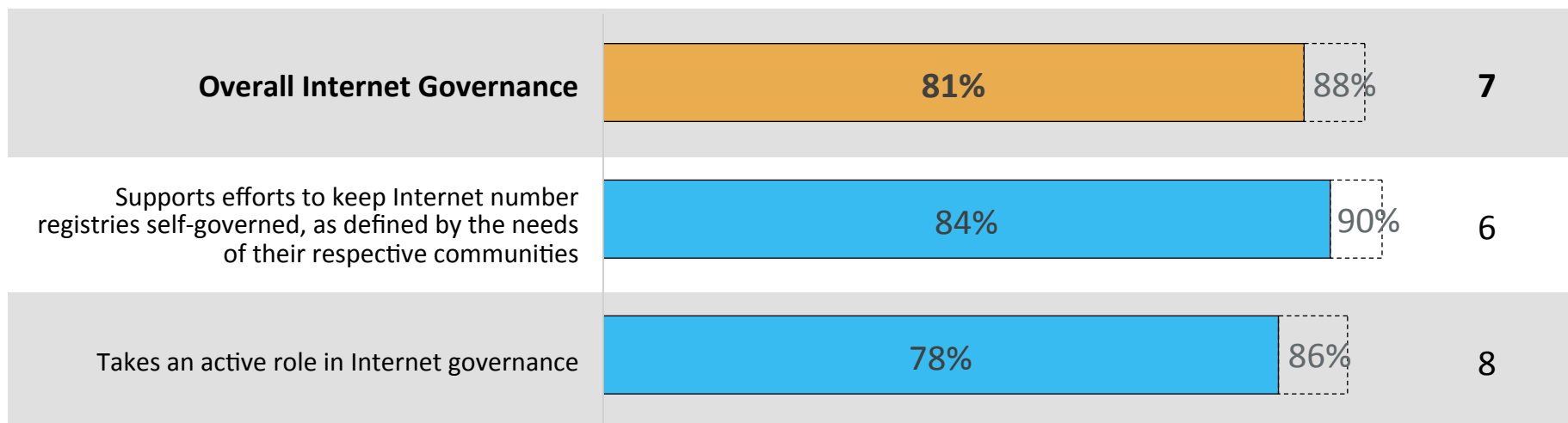
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Internet Governance is one of ARIN’s strengths. A large majority of the community believes ARIN supports efforts to keep Internet number registries self-regulated and takes an appropriately active role in Internet governance, and performance is close to expectations for an excellent provider.

Internet Governance Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



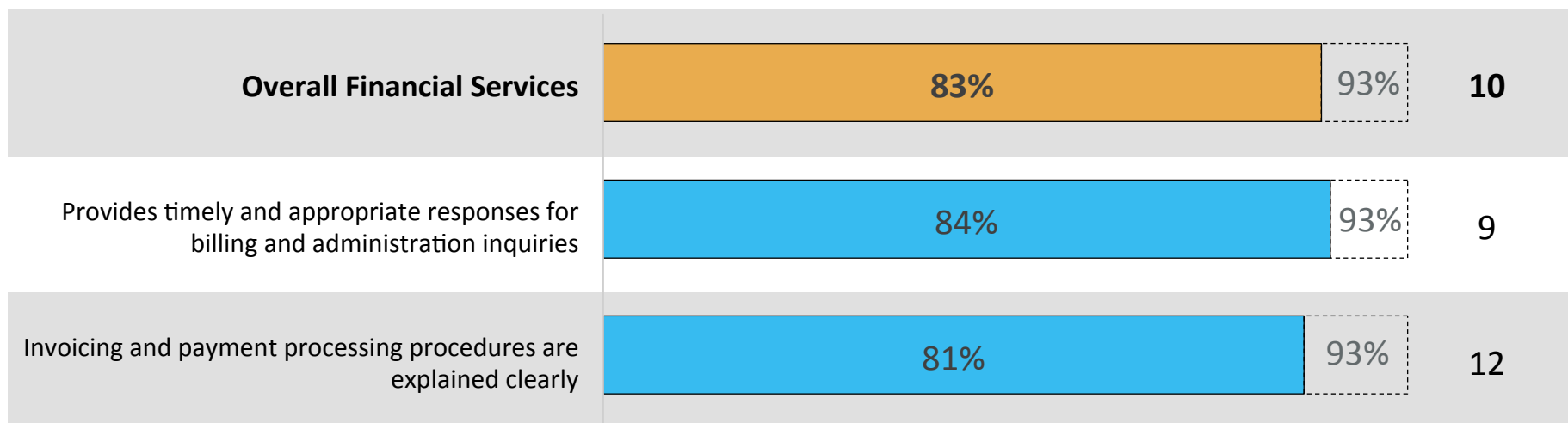
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Financial Services is another relative strength for ARIN, with high performance that is not far from high expectations. The biggest opportunity for improvement is in clarity of invoicing and payment procedures.

Financial Services Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



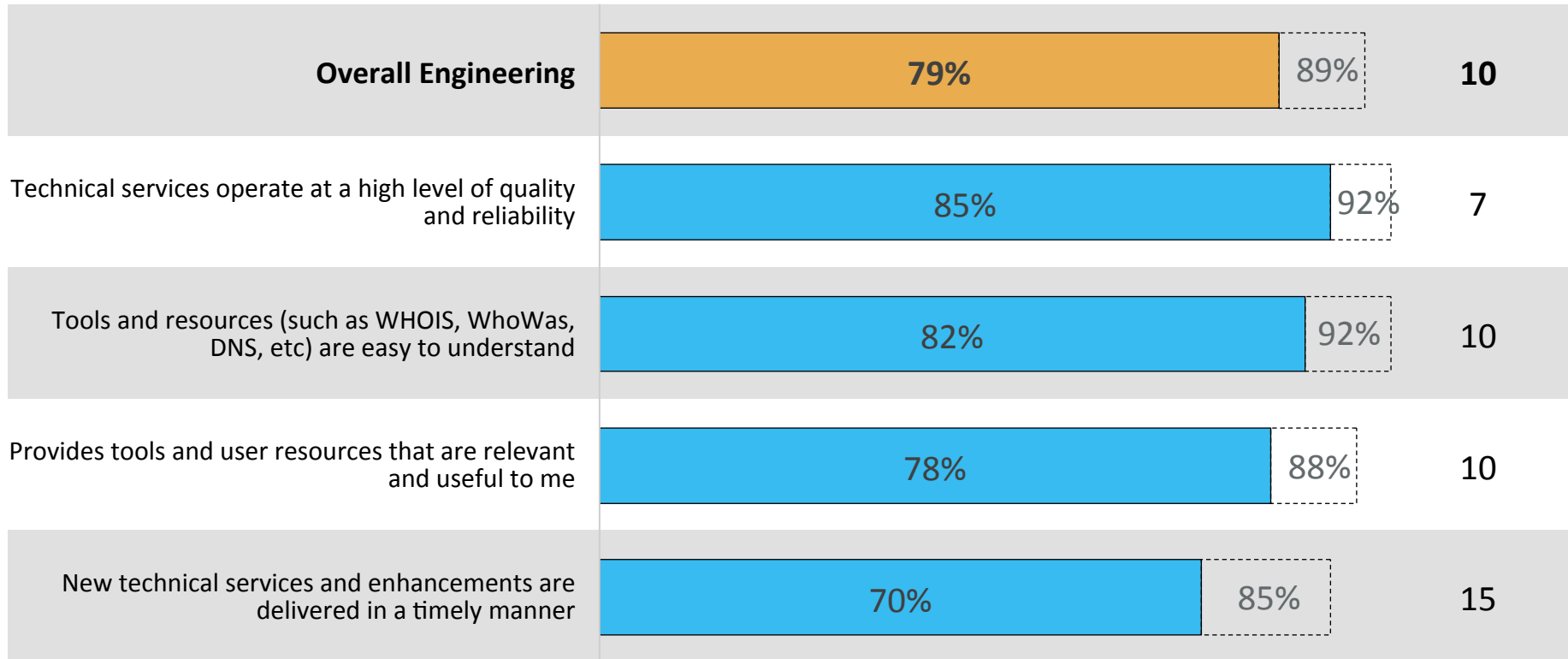
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ARIN performs well on Engineering with the highest rating and smallest gap on the quality and reliability of technical services. Timely delivery of new services and enhancements has the most room for improvement.

Engineering Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



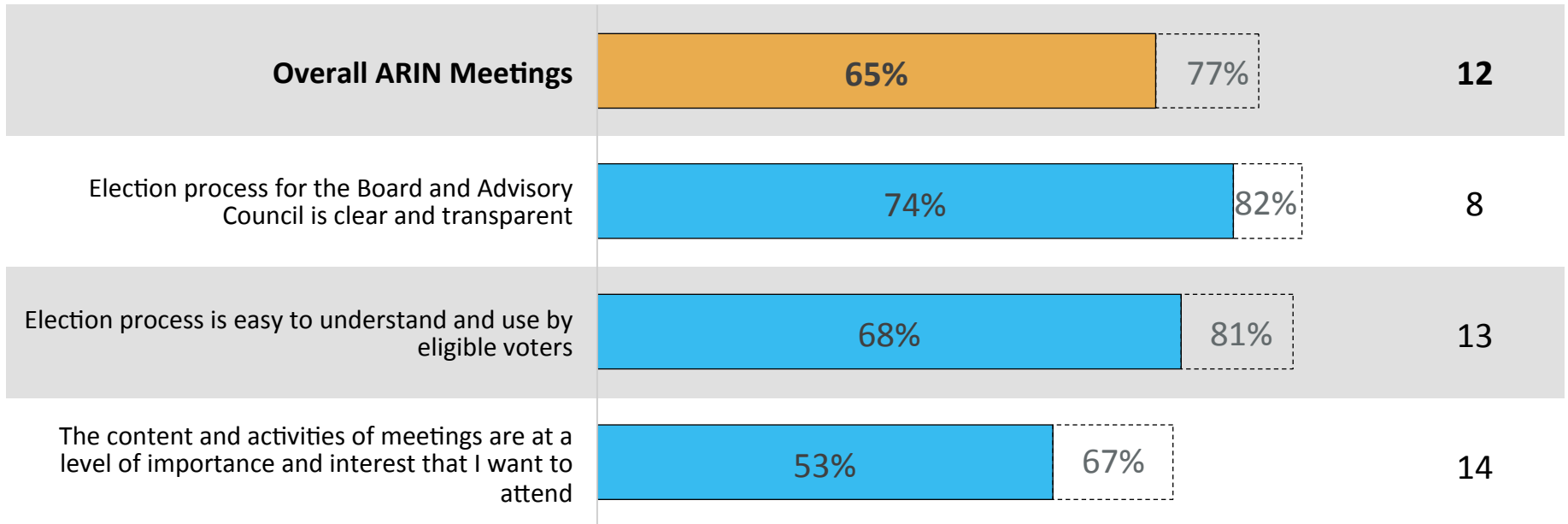
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Expectations for Meetings are lower than most other service dimensions and ARIN performs moderately well compared to them. Just half of the community feel that the content of ARIN meetings make them want to attend. The community rates ARIN higher on the election process being easy to understand and use, but expectations are also high.

ARIN Meetings Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



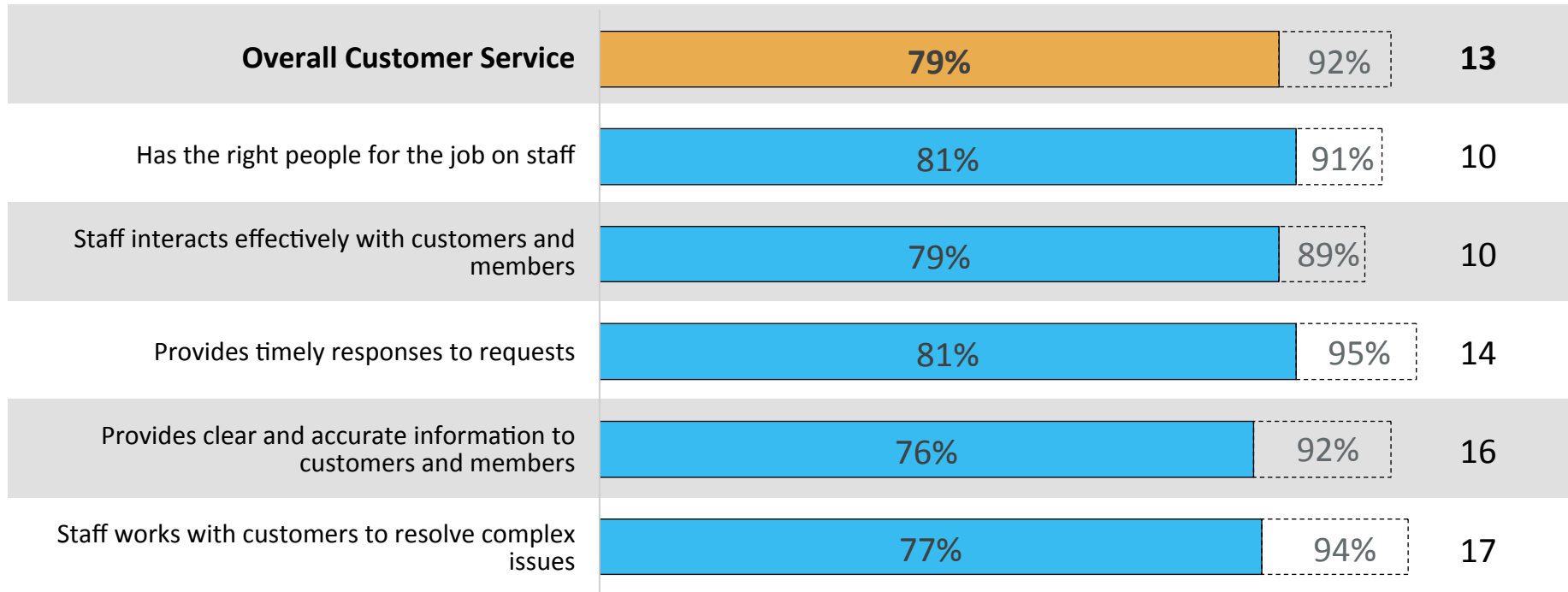
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Although ARIN performs well on Customer Service, it falls below community expectations which are high in this area. ARIN has the greatest improvement opportunities on providing clear information and working with customers to resolve complex issues.

Customer Service Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



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Timeliness, clarity and staff issues are the most frequently cited areas for improvement on Customer Service.

Suggestions for Improving Customer Service

Timeliness

"There needs to be a way to get a hold of a knowledgeable human in real-time."

"Speed response time. Recognize that this is an area that warrants practical solutions to business and marketplace needs and issues."

"While I understand that ARIN receives many requests, often I feel that ARIN staff did not even read my emails completely. The response time is also quite slow."

"Provide 24x7 services using an automated system."

"ARIN needs to extend hours of operations."

"Provide feedback more frequently on running tickets that may take several days to resolve. Going 3,4,5 days without any feedback at all is at least unnerving."

Clarity

"Less insider jargon in the policies and explanations. Gets a little confusing sometimes."

"Some people as in myself, had never registered for IP's or an ASN. It would have been nice for someone to have given me a short welcome letter telling me what I needed to have ready before applying."

"The instructions need less legalese and more average human talk."

"Send more info about ARIN services and the work they do to members."

"The transfer process is painful - at least the old form. Hard to understand what legal paperwork is required. Tickets are just closed referencing a website instead of providing specifics."

Staff

"More consistency in customer service and less nitpicking by certain staff."

"Terse answers from disinterested, overworked staff seems to be the norm when somebody who is new to the process has a question and reaches out for help so they can "do it right" and not be a burden. ARIN has a rep for being scary, mean, and unapproachable."

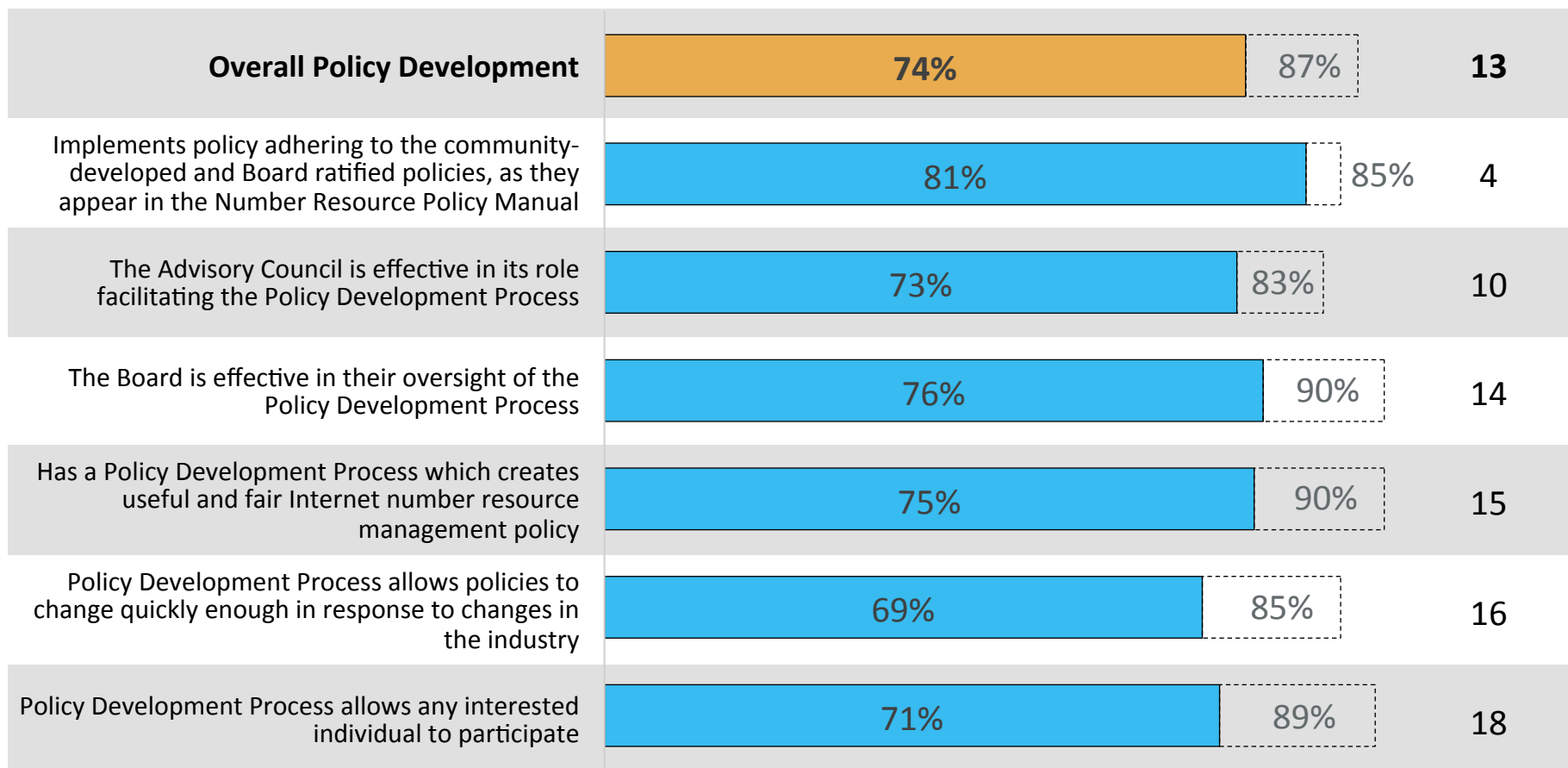
"ARIN will likely need to hire more staff, or train more internal staff on the more complex services it offers. We are seeing some delays in responses, we feel as though only one person is knowledgeable on various services such as RPKI."

ARIN nearly perfectly meets expectations in implementing policy that adheres to what is developed, ratified and published. The major gap area is in allowing individual participation in the process (expectations are high). Other areas with improvement opportunity include being to adapt quickly to industry change, useful and fair resource management, and effective board oversight.

Policy Development Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



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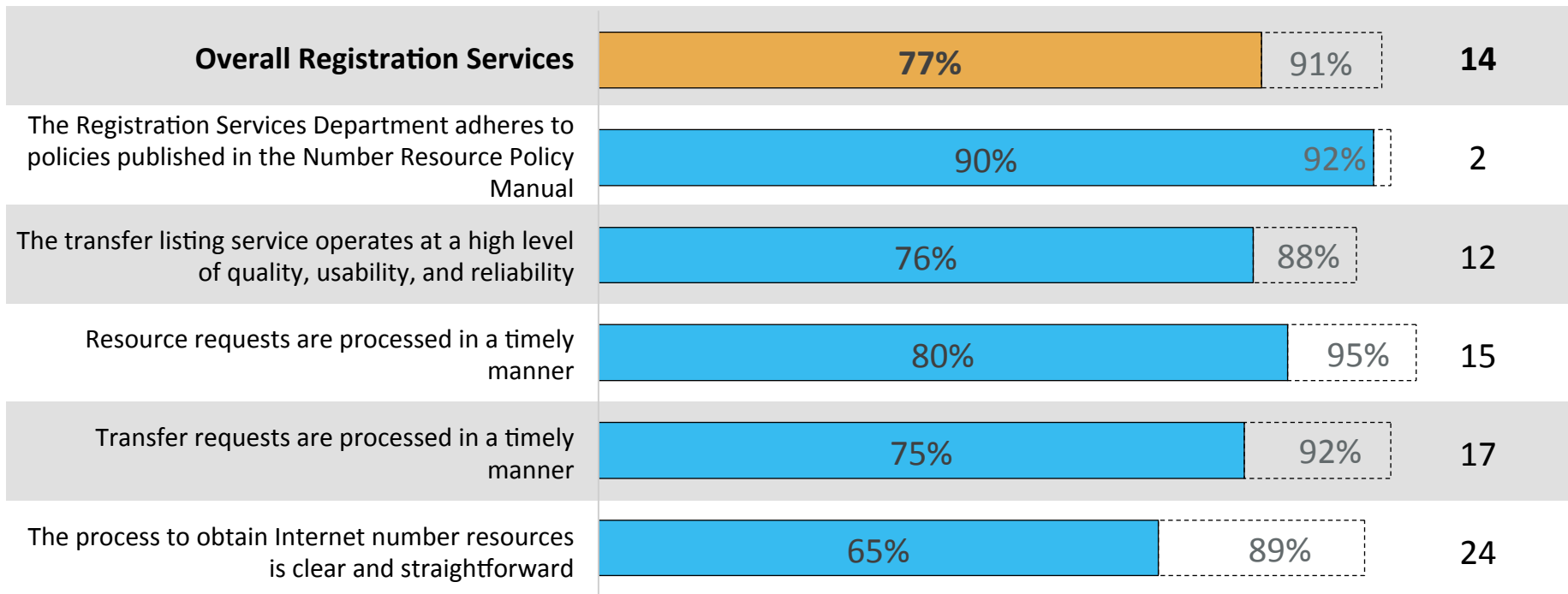
Registration Services is an area of key opportunity for ARIN to improve. In particular, clarity of the registration process is a key gap area for ARIN to focus on. Timeliness of resource and transfer requests are also an issue.

- There are major differences in how companies of different sizes perceive the clarity of the process to obtain Internet number resources. Small companies, with less than 100 employees, are significantly less likely to feel ARIN’s process is clear and straightforward.

Registration Services Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations



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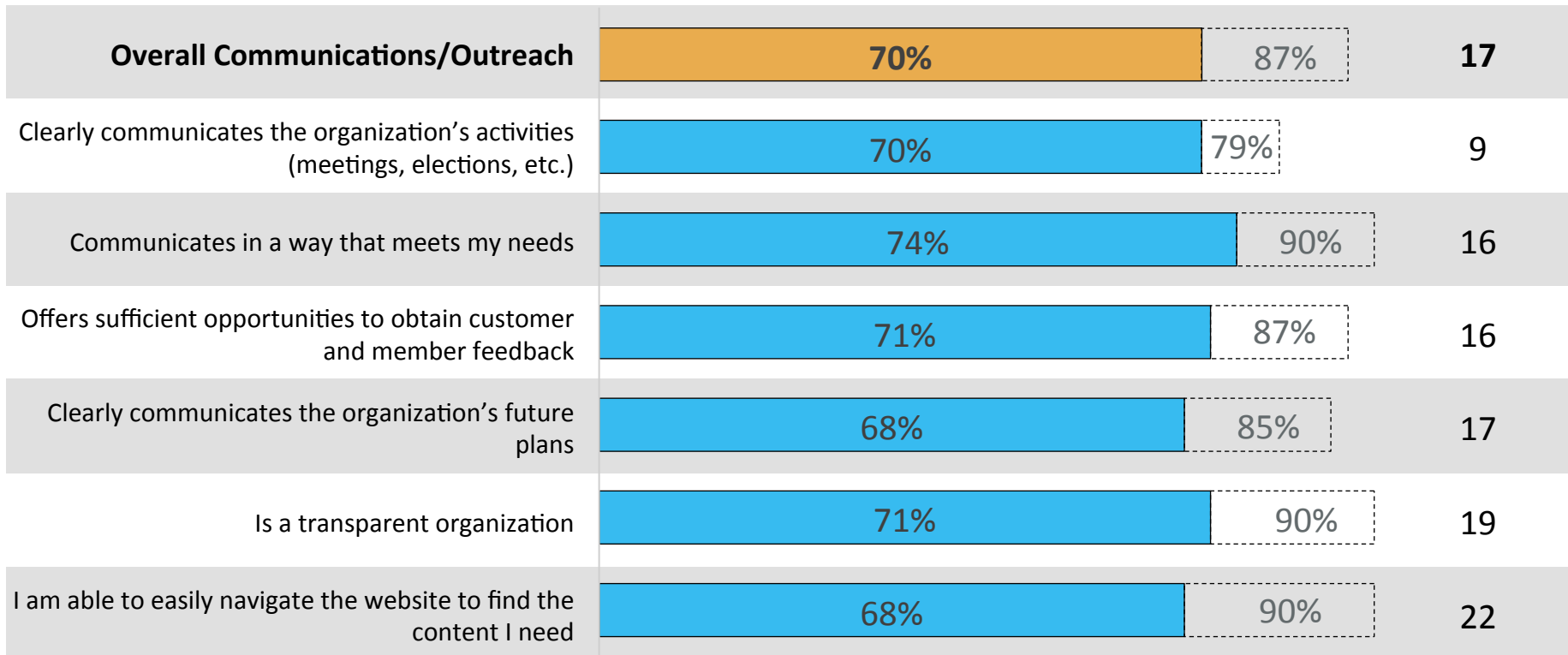
Communications and Outreach should be a top focus area for ARIN. ARIN does the best job of meeting expectations on communicating organization activities, and needs the most improvement on having an easily navigable website, transparency, and clarity of communicating plans.

- Improvement on Communication/Outreach can be targeted at specific groups. Those in smaller companies have difficulty navigating the website while those with low familiarity with the organization have trouble getting communications about ARIN’s activities. Community members in technical occupations are more likely than managers to expect and credit ARIN for transparency.

Communications/Outreach Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box)

Points from Expectations

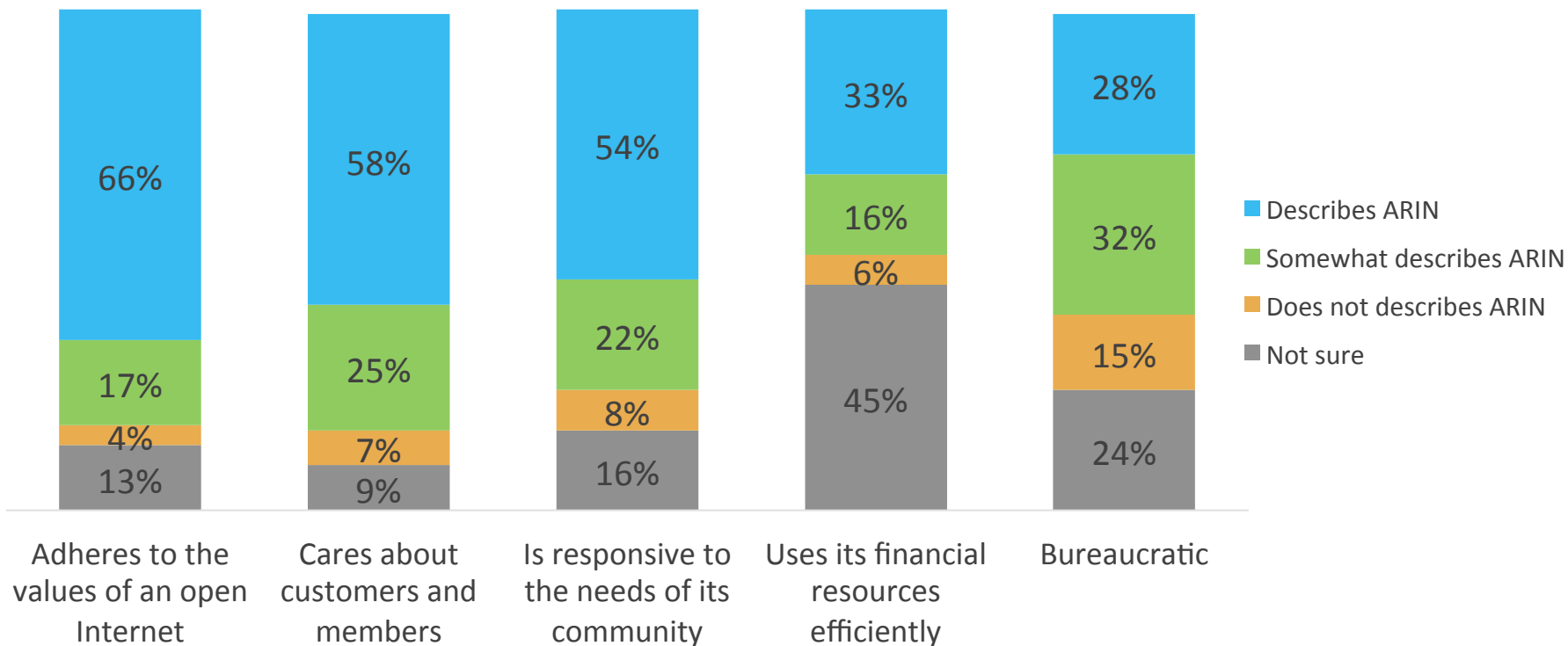


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A majority of community members believe ARIN adheres to the values of an open internet and cares about its members and customers. Those more familiar with ARIN are less positive about its image, particularly in the area of being “bureaucratic.”

Descriptions of ARIN

(n=699)



Different image areas vary in how much they impact loyalty to ARIN (defined by a composite of satisfaction, value, and willingness to switch if given a choice). The most important image areas are being responsive to community needs, caring about customers, and using financial resources efficiently.

ARIN Image (n=699)

	Priority Index*	Importance^	% Describes Well (8-10)
Uses its financial resources efficiently	1.5	23%	33%
Is responsive to the needs of its community	1.2	25%	54%
Cares about customers and members	1.0	24%	58%
Adheres to the values of an open Internet	0.7	20%	66%
Bureaucratic	0.2	7%	28%

A Priority Index identifies areas where ARIN should focus most on managing its image. The highest indexed area is in the perception of using financial resources efficiently. Convincing people ARIN is effective here will have the greatest impact on loyalty.

*Priority Index = Importance x % Needs Improvement (rated 1-7) * 10

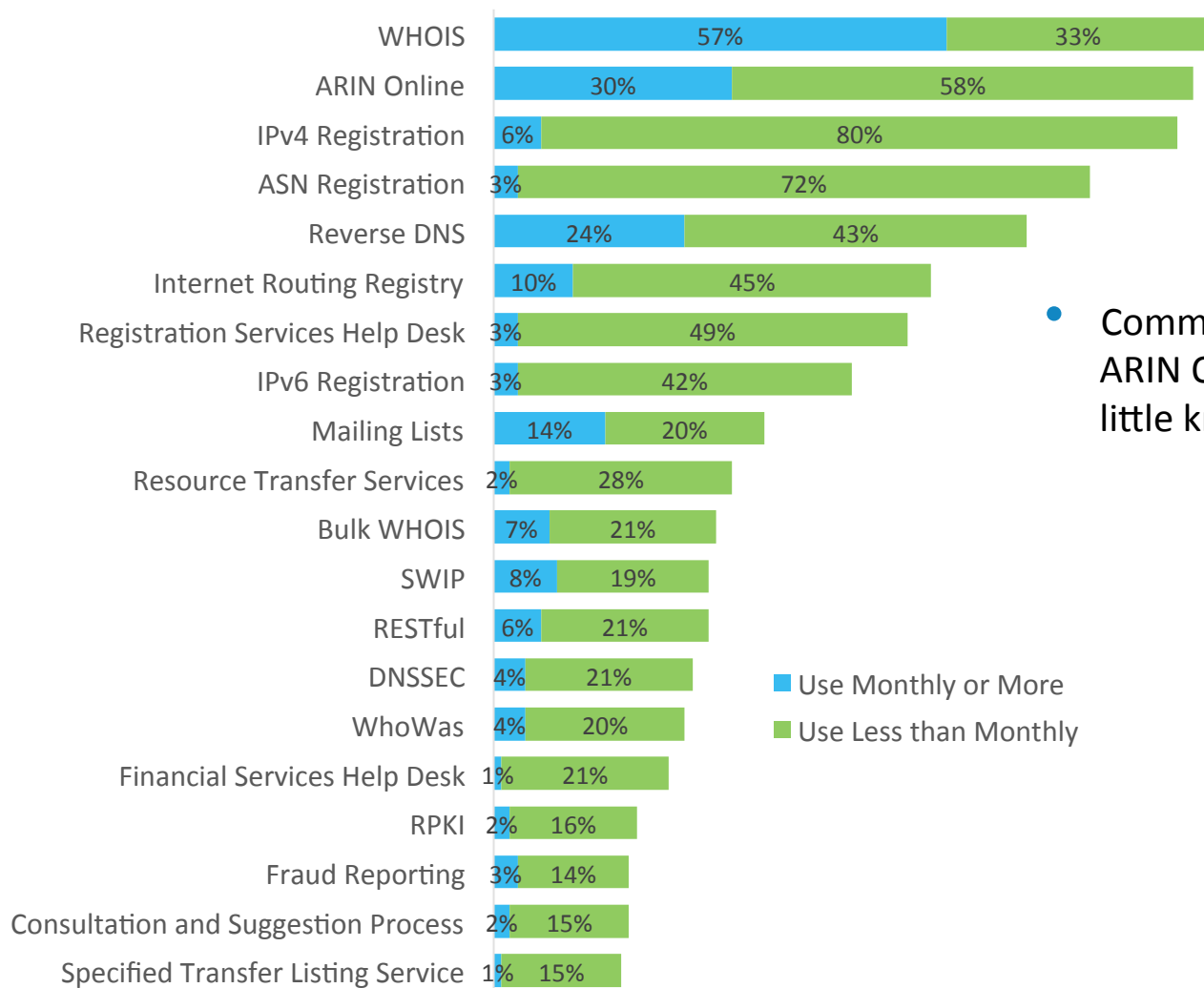
^Based on correlation with likelihood to continue using ARIN in Q3

Q10. Below is a list of events and meetings facilitated by ARIN. Please check the ones you have attended in the past two years

WHOIS is the most frequently used ARIN product followed by ARIN Online and Reverse DNS. Several products and services appear to be narrowly marketed with up to one-third of community members completely unaware of the many products and services.

Use of ARIN Products and Services

(n=699)



*"I don't think I have any need to use it."
 "I rarely if ever, need it."
 "I'm not really sure what it is."
 "Didn't know it was available."*

- Community members who do not use ARIN Online do not need it or have little knowledge of what it offers.

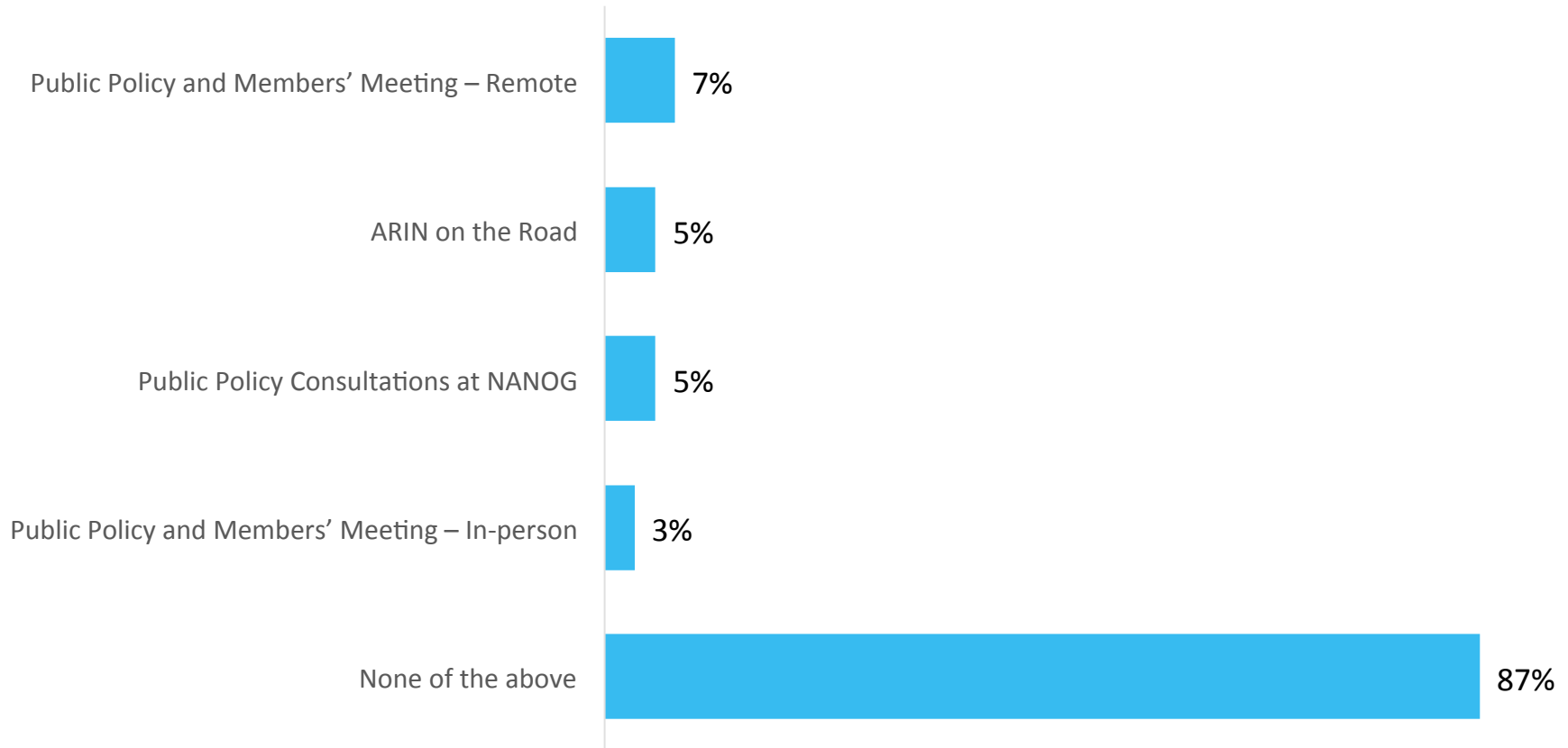
■ Use Monthly or More
 ■ Use Less than Monthly

Q7. Below is a list of services and products developed by ARIN. For each one, please indicate how frequently you use each product or service.
 Q9a. Why haven't you used ARIN Online?

The vast majority of the community does not attend ARIN events

Attendance of ARIN Events

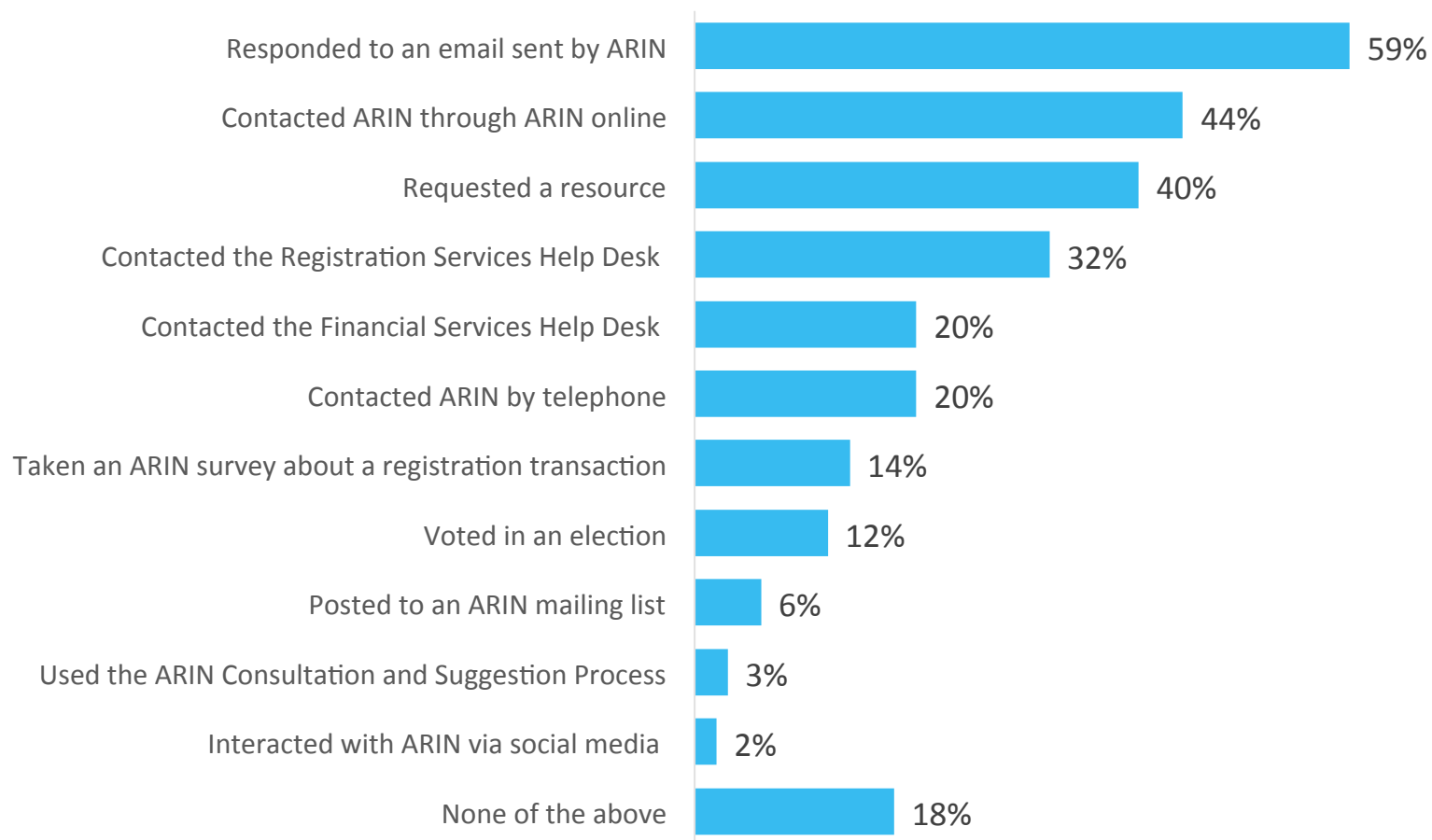
(n=699)



Virtual methods are the most common way members of the community contact ARIN; email and contact through ARIN online are the most frequently cited.

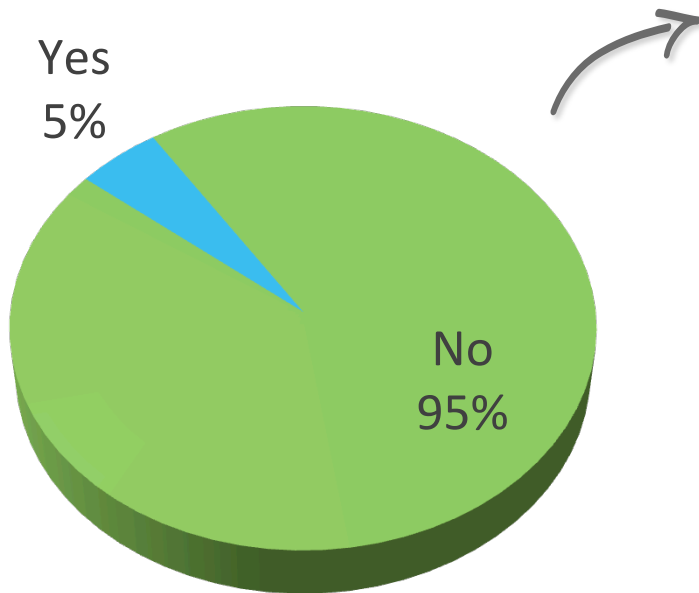
Contact with ARIN in the Past 12 Months

(n=699)



Few community members have participated in the Policy Development Process in the last year. A lack of time, satisfaction with current policy and a belief that individuals do not think they can have an impact are top reasons why community members do not participate.

Participation in the ARIN Policy Development Process in the Past 12 Months (n=699)

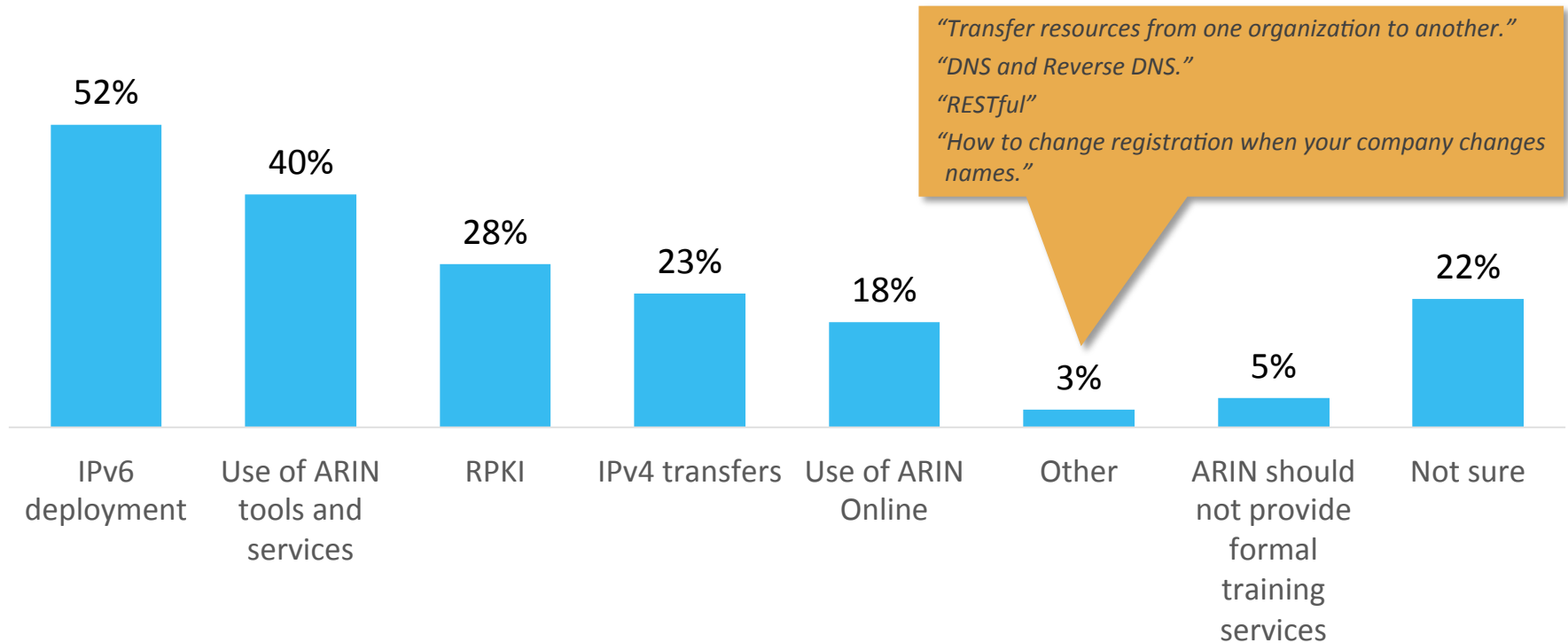


Reason for Not Participating (Among those not participating; n=663)

I do not have time to participate	26%
I am happy with ARIN policy and do not see a need to get involved	23%
I do not think I can have an impact on ARIN Policy	22%
I do not have the resources to participate	18%
I do not have any interest in participating	13%
Other	12%
Not sure	16%

There is strong interest in training provided by ARIN. IPv6 deployment and more information on how to use ARIN tools and services are likely to be the most popular training courses.

Training Interest (n=699)

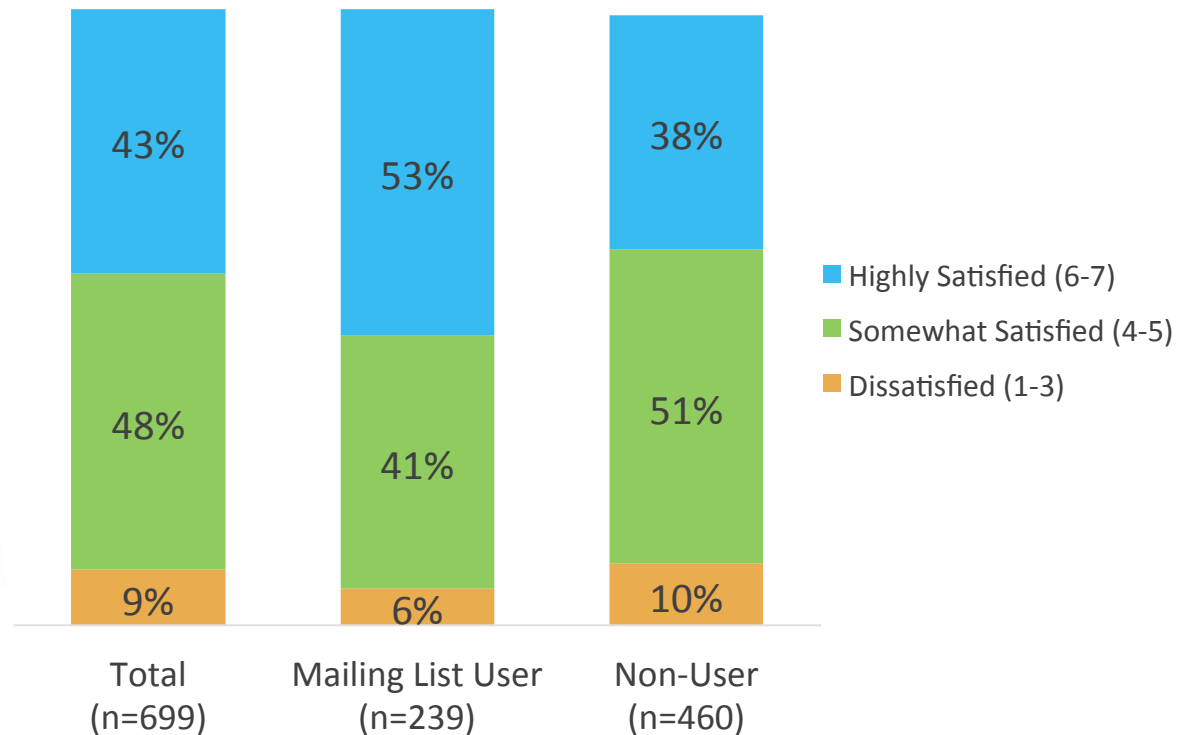


There is room for improvement on mailing list satisfaction. Barely half of users are satisfied with their ability to comment and participate using lists.

Mailing List Satisfaction

Mailing List Examples Shown in Survey

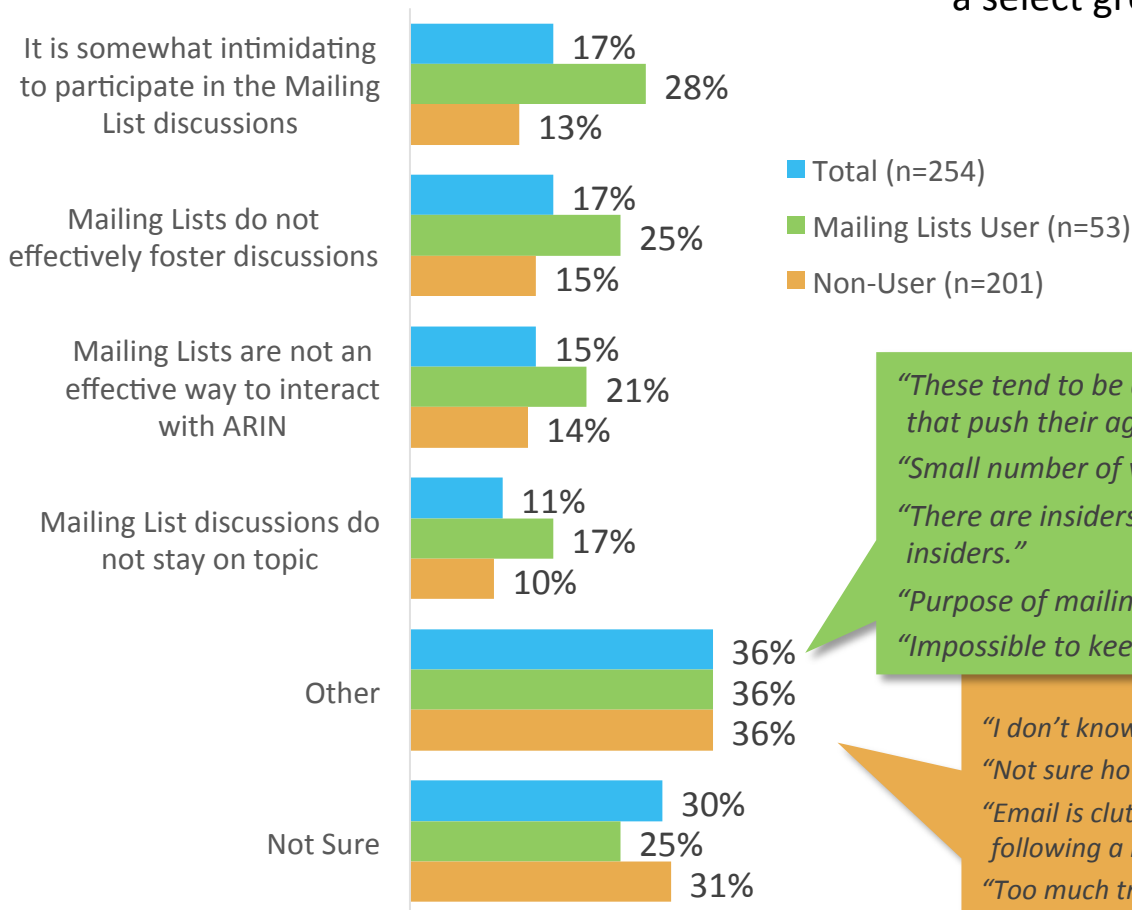
ARIN Announce
ARIN Discuss
ARIN Public Policy Mailing List
ARIN Consult
ARIN Suggest
ARIN Tech Discuss
ARIN Issued



Current unsatisfied list users believe the process is intimidating and ineffective.

Reasons for Lower Satisfaction

(Among those who rated satisfaction less than a 5 on a 7-point scale)



- Non-users of mailing lists have low satisfaction largely due to low awareness of the lists. Users feel it is difficult to keep up and that lists are for a select group of “insider” members.

“These tend to be dominated by the same individuals that push their agenda.”
“Small number of vocal participants.”
“There are insiders and outsiders and we’re not insiders.”
“Purpose of mailing lists not clear.”
“Impossible to keep up.”

“I don’t know about ARIN mailing lists.”
“Not sure how to get on the list.”
“Email is cluttered with other work content making following a list difficult.”
“Too much traffic.”

Professional Characteristics

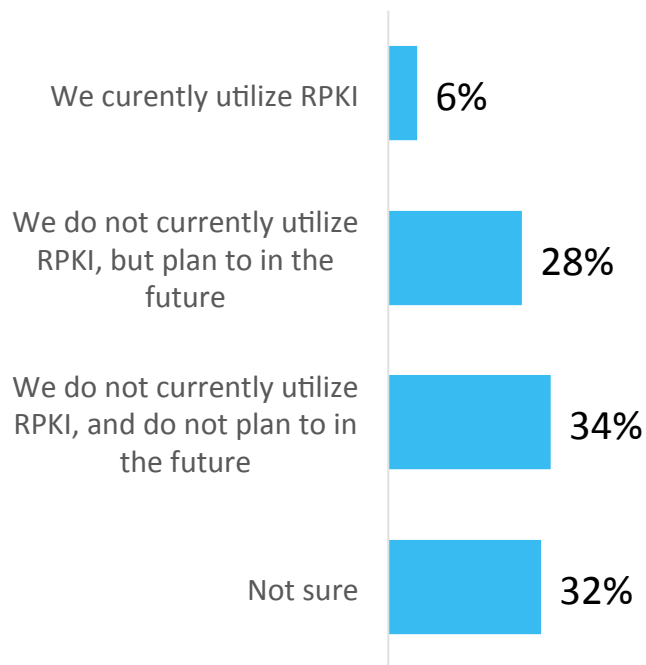
- Almost half of community members who participated in the survey are a network engineer.
- The average years in the profession is 17.

Years in Profession (n=699)	
Less than 1 year	0%
2 to 5 years	3%
6 to 10 years	11%
11 to 15 years	22%
16 to 20 years	26%
21 or more years	37%
<i>Average Years in Profession</i>	<i>17</i>

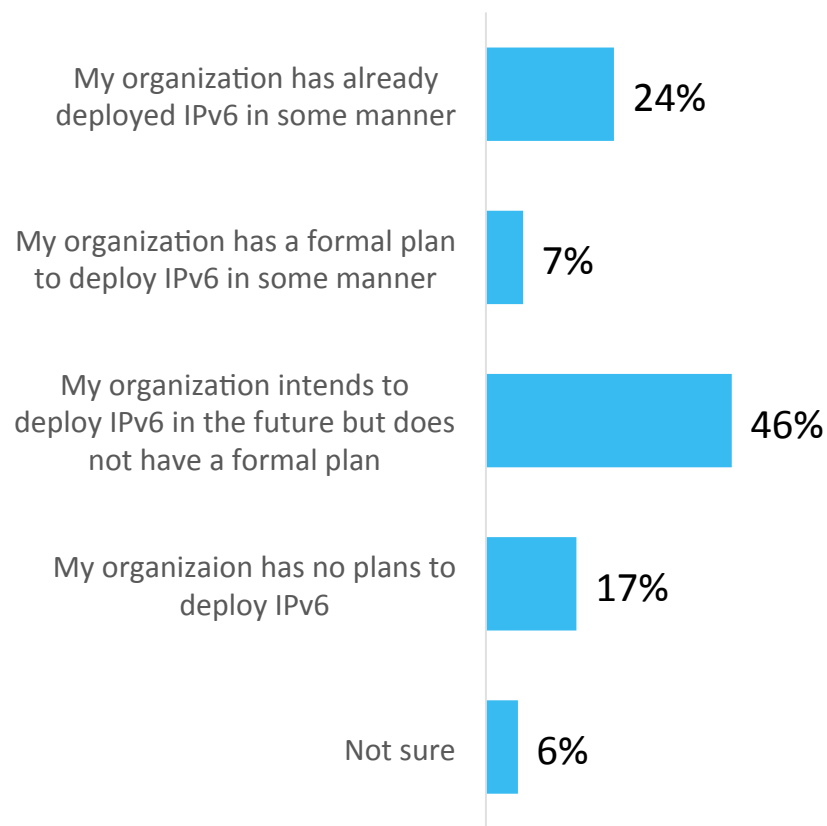
Occupation (n=698)	
Network Engineer	46%
Management	26%
Systems Administrator	17%
Software Coder/Developer	3%
Marketing/Business Development	1%
Attorney/Legal Services	1%
Other	7%

RPKI and IPv6 Deployment are still not the norm among ARIN community member companies.

RPKI Usage (n=699)



IPv6 Deployment (n=699)



Q17. Does your organization utilize RPKI?

Q18. What is your organization's current plan for IPv6 deployment?



ARNES

Thank You