



SCOTTISH WATER

Annual Licensed Provider Survey
Draft Report August 2019



Full colour thinking from Turquoise for Scottish Water

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1. Project Background

In 2019, Scottish Water (SW) again commissioned Turquoise Thinking to conduct their annual Licensed Provider (LP) survey using semi qualitative – quantitative research.

All 24 active LPs were contacted (a number of LPs have combined / merged in the last 12 months and there have been a couple of new LPs who have entered the market) by Scottish Water initially.

This year, the survey followed a similar methodology to 2018 with an initial short online survey sent out by Scottish Water via a link embedded into the initial invite email. The online survey served to gain which teams within Scottish Water LPs had had contact within the last 12 months and their ratings on various metrics across those teams prior to any in depth discussion.

Having completed the online questionnaire, a more exploratory follow up telephone depth was conducted similar to previous surveys. This served to explore perceptions and rationale behind the metric scores given for the individual teams. This was conducted by a senior Turquoise moderator. This year, this element was shortened to focus on the rationale for satisfaction scores only to free up time to enable Turquoise to explore each team an LP had had interaction with (previously we had only sufficient time to go through 4 or 5 teams maximum).

The depth interviews were designed to be 45-60 minutes duration.

A total of 13 LPs took part in 2019's survey. 13 completed the online element and 10 agreed to the subsequent in-depth discussion. This is slightly lower than in previous years.

The following report details the findings of the research in 2019. Comparisons have been made to previous years where relevant.

Please also note that the individual metrics have been calculated using scores provided by LP interviewees who had had dealings with the respective teams, or who felt in a position to comment / score.

Three LPs wished to remain anonymous again this year, hence any quotes used by these LPs have been anonymised.

2. Objectives

The overarching aim of the research remained...

'To understand the levels and drivers of satisfaction that LPs have with Scottish Water and compare where possible to previous survey results.'

More specifically the research objectives are:-

- To understand the current levels of service experience that the LPs have with Scottish Water (SW).
- To determine overall levels of satisfaction that LPs have with SW.
- To determine how the levels of satisfaction vary by the SW teams supplying services to the LP.
- To probe the drivers of satisfaction and dissatisfaction with the service provided by SW.
- To discover the underlying motivations that LPs have in relation to SW.
- To examine specific examples of service failures and success.
- To discover the relative importance of the range of services provided by SW.
- To probe improvements that LPs would like to see with the service provided by SW.

3. Executive Summary

The following table highlights the key changes between 2019 and previous surveys. The top scoring team across most aspects was again Account Management. However, the Market Data team saw considerable improvement since last year.

Key: Since 2018 **has improved, is static, is worse.**

Shaded pink = key contact points, green = medium, non = low.

Service Satisfaction Averages	2016	2017	2018	2019	Change in scores	
Wholesale Service Desk	5.2	5.4	4.8	5.7	+0.9	Overall, 9 out of 11 teams have improved their service satisfaction averages in 2019. Despite being a newer team, Market Data showed the greatest positive shift, although the sub samples are small and therefore caution needs to be heeded. Wholesale Account Management = 
Gap Site and Deregistration	4.1	4.2	4.8	4.8	-	
Metering Services	4.4	5.3	5.3	5.5	+0.2	
Trade Effluent	5.8	5.7	5.7	6.1	+0.4	
Water Byelaws	5.3	4.9	4.9	5.7	+0.8	
Account Management	6.3	6.4	6.0	6.6	+0.6	
Wholesale Billing Team			4.8	5.6	+0.8	
Exemptions and Allowances			5.5	5.6	+0.1	
Development Operations	4.4	4.3	4.0	4.6	+0.6	
Market Data			3.9	5.6	+1.7	
Service Review Team	5.2	4.3	6.0	6.0	-	
Satisfaction Averages with Quality of Responses						
Wholesale Service Desk	4.8	4.5	4.8	5.6	+0.8	Overall, 9 teams have improved their quality of response satisfaction averages in 2019. The Service Review Team scored the
Gap Site & Deregistration	4.0	4.2	4.9	5.1	+0.2	
Metering Services	4.5	5.1	5.2	5.5	+0.3	
Trade Effluent	5.7	5.3	5.8	5.8	-	
Water Byelaws	5.7	4.8	5.6	5.7	+0.2	

Account Management	6.2	6.3	6.0	6.4	+0.4	highest for this element in 2018 but saw a decrease in mean score this year. Market Data saw the greatest improvement in 2019. Wholesale Account Management =
Wholesale Billing Team			5.0	5.6	+0.6	
Exemptions & Allowances			5.4	5.8	+0.4	
Development Operations	4.1	4.7	3.8	4.6	+0.8	
Market Data			4.4	5.6	+1.2	
Service Review Team	5.0	4.7	6.3	5.7	-0.6	
						
Satisfaction Averages with Ease of Interaction						
Wholesale Service Desk	5.9	5.5	5.6	6.1	+0.5	Overall, 10 teams have improved their ease of interaction satisfaction averages in 2019. Gap Sites and Deregistration saw a fall in mean score for this element in 2019. Again, Market Data saw the greatest improvement this year. With an exceptionally high score, Wholesale Account Management =
Gap Sites & Deregistration	4.2	3.8	4.9	4.7	-0.2	
Metering Services	4.0	5.1	5.0	5.6	+0.6	
Trade Effluent	5.7	5.3	5.9	6.0	+0.1	
Water Byelaws	5.6	4.9	5.0	5.4	+0.4	
Account Management	6.4	6.6	6.4	6.8	+0.4	
Wholesale Billing Team			5.5	5.8	+0.3	
Exemptions and Allowances			5.5	6.0	+0.5	
Development Operations	4.2	4.5	4.4	5.2	+0.8	
Market Data			4.5	6.0	+1.5	
Service Review Team	5.2	5.5	6.0	6.1	+0.1	
						

Personal Effort	2019% low (score of 1+2)	2019 % High (score of 6+7)	Previous years comparison
How much personal effort is required from you to deal with SW. A low score of 1 or 2 indicates that a small amount of effort is required by LPs to deal with SW. A high score of 6 or 7 indicates a lot of effort is required. Therefore, the lower the score, the more positive the outcome.	50%	0%	low effort score 53% 2018; 26% 2017; 28% 2016 high effort score 20% 2018; 14% 2017; 0% 2016
Customer Loyalty	Net Promoter Score	Previous years comparison	
This score is based on the idea that customers are promoters, neutral or detractors.	+50%	NPS in 2018 -1%; 2017 0%; 2016 -31%	
Overall Satisfaction Average	2019	Previous years comparison	
	5.8	5.2 2018; 5.4 2017; 5.2 2016;	

4. Sample Background

LPs that took part in the 2019 survey were:

Wave Limited (new venture between merged NWG Business Limited and Anglian Water Business (National) Limited)

Blue Business Water Limited

Castle Water Limited (combining Castle Water Limited and Castle Water (Scotland) Limited)

Clear Business Water Limited / Aimeria Limited

Commercial Water Solutions Limited

Three Sixty Water Limited (online only)

Scottish Water Business Stream Limited

Veolia Water Projects Limited (online only)

Water-Plus Limited (combining Water Plus Limited and Water Plus Select Limited)

The Water Retail Company Limited

Water 2 Business Limited

Pure (CGV) Limited

Earls Gate Water Limited (online only)

Those that declined were: Affinity for Business Limited, Everflow Limited, Lettermay Limited, Real Water Limited and Thames Water Commercial Services Limited.

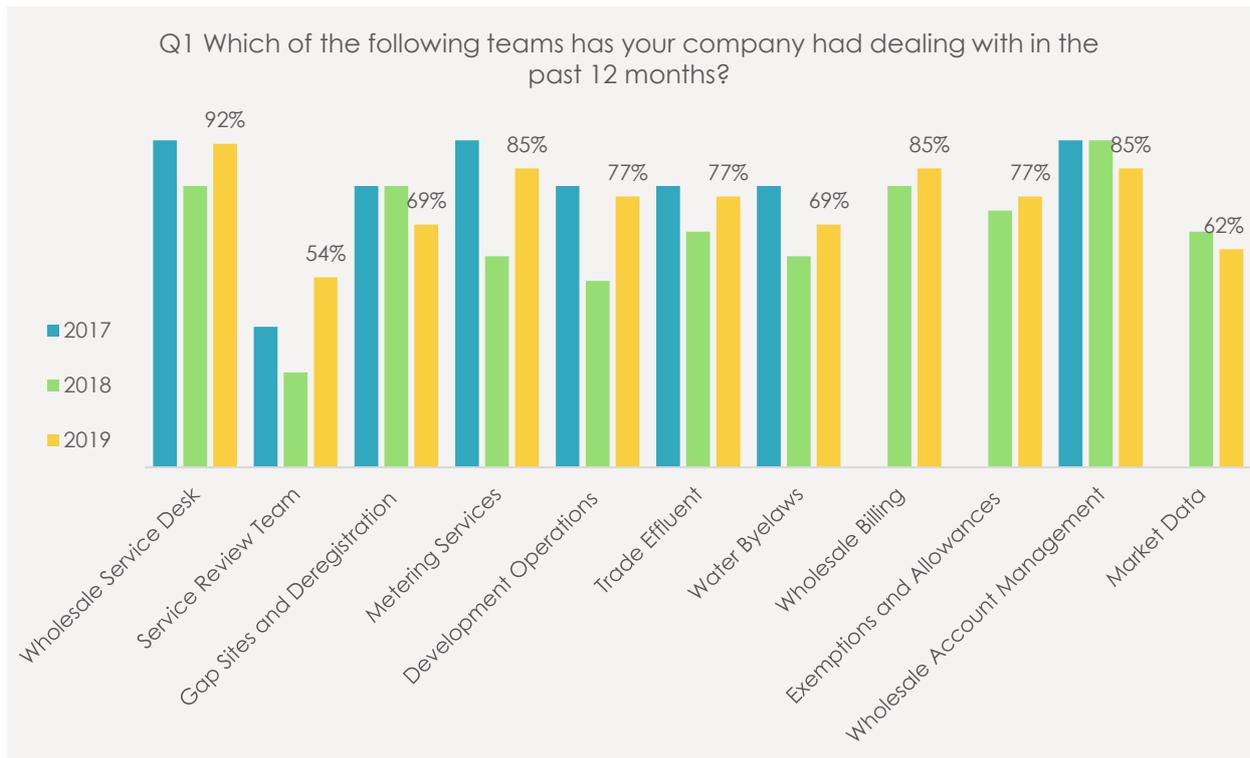
Those that did not respond included: Advanced Demand Side Management Limited, Brightwater Services Limited, Regent Water Limited, Smarta Water Limited, Source for Business Limited, and Sutton & East Surrey Water Limited.

As with the previous survey, different LPs had varying relationships with Scottish Water, with some being newer to the role and some having more frequent interaction with Scottish Water than others.

The report details charts covering the individuals team metrics of satisfaction, ease of interaction and quality of response.

YOY comparisons have been made where applicable and relevant. Where charts have been produced and comparisons to previous years have been displayed, this has been across the last three years (2017-2019 where possible – however some teams were introduced / changed in 2018 hence only the last two years can be charted), and Turquoise has used shortened labels for some teams and only displayed 2019 percentages to enhance readability of the charts.

The following table highlights the Scottish Water teams with which LPs have the greatest interaction with.



Sample = 13

Using a similar method to segment the teams as in previous years i.e. into high level contact points (high priority), mid-level contact points (medium priority) and low level contact points (low priority) based upon the number of LPs interacting with that team, it can be seen that there have been some considerable changes since 2018. However, the small sub-sample needs to be kept in mind.

The table on the following page illustrates that there have been some notable shifts witnessed this year in terms of the level of contact LPs have had with the various teams. Many of the teams had seen increased interaction in the last 12 months.

The majority of teams are falling into high level contact points this year, whereas in previous years most of the teams fell into medium level contact points. In 2018, the Service Review Team fell into low level contact points. However, this year LPs have had increased contact with this team, placing the SRT into medium level contact points. Therefore, no teams feature in the lower bracket.

High Level Contact Points (>75% LPs contacted them)	Medium Level Contact Points (>50% / < 75% % LPs contacted them)	Low Level Contact Points (<50% LPs contacted them)
Wholesale Service Desk Metering Services Wholesale Account Management Customer Revenue – Wholesale Billing Customer Revenue – Exemptions and Allowances Development Operations Trade Effluent	Customer Revenue – Gap Sites and Deregistration Market Data – Wholesale Transactions and Proactive Premises Management Team Water Byelaws Service Review Team	No teams had a low level of contact with LPs this year.

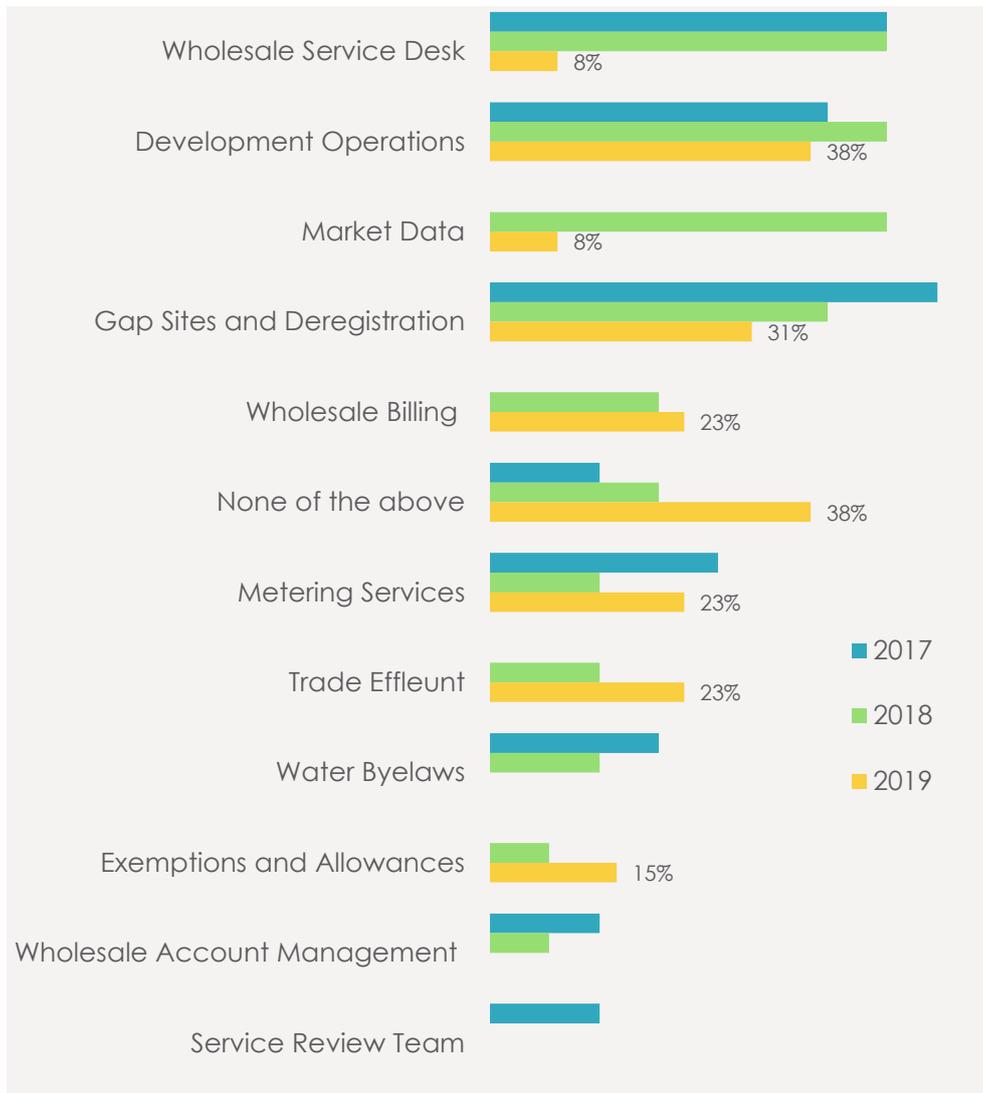
The chart on the following page highlights that the teams which LPs reported they had the most issues with across the last 12 months were: Development Operations (38%) and Customer Revenue - Gap Sites and Deregistration (31%). Development Operations and Gap Sites and Deregistration had both seen issues reported in the previous year, however, the percentage of issues reported in these teams was lower this year.

The proportion of LPs reporting issues with the Wholesale Service Desk and Market Data was much lower this year, compared to previous years recorded.

There has been an increase in the proportion of LPs reporting issues with the Metering Services, Trade Effluent, Wholesale Billing and Customer Revenue – Exemptions and Allowances.

No issues were raised for Wholesale Account Management or the Service Review Team in 2019.

Q2 Areas where LPs experienced issues in last 12 months (or since becoming an LP)

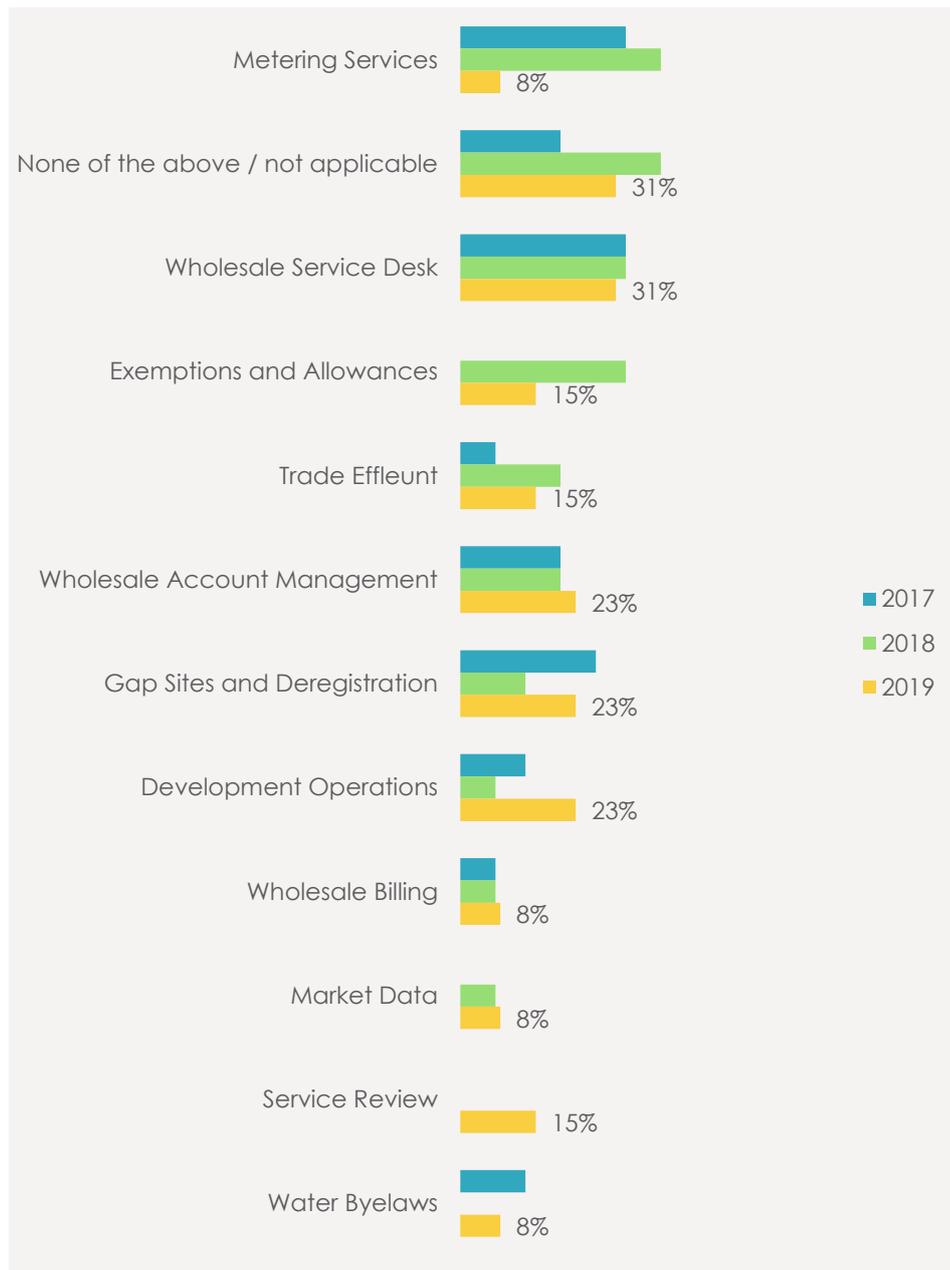


Sample = 13

The Wholesale Service Desk saw the most improvement reported by LPs this year (31%). Although marginally less improvement was recognised for this team in 2019, than in previous years.

Slight improvements across the year were also reported for the Customer Revenue - Gap Sites and Deregistration, Development Operations and Market Data.

Q3 Areas where LPs noticed improvements in last 12 months (or since joining)

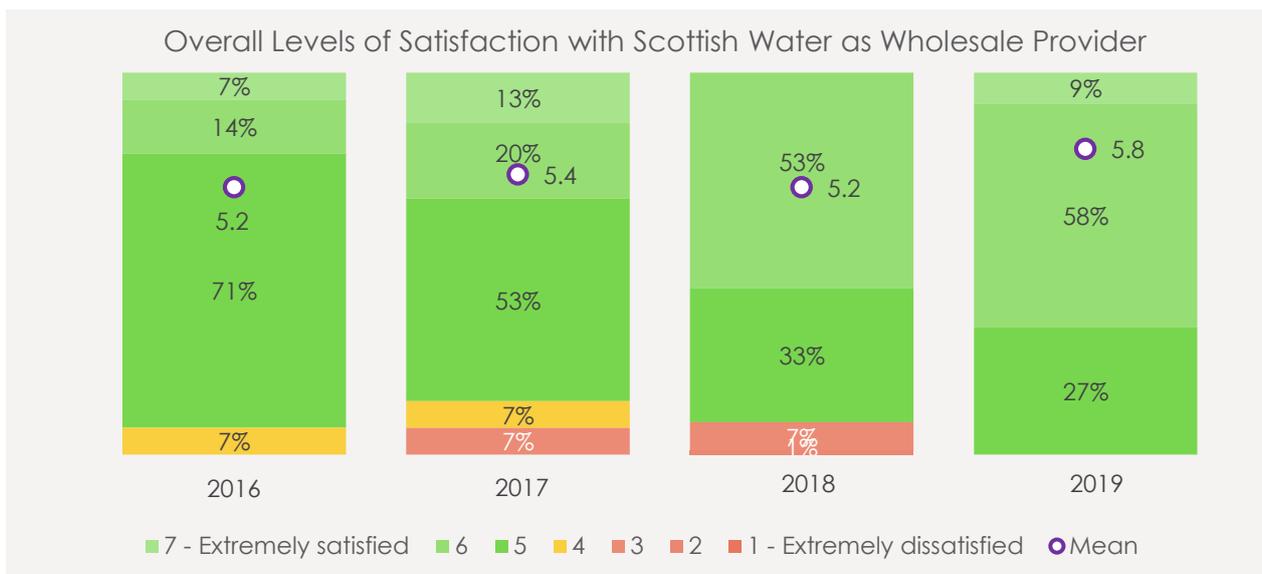


Sample = 13

5. Satisfaction with Scottish Water as a Wholesale Provider

5.1 Overall Satisfaction

When looking at the combined overall satisfaction score (those that scored SW a 5, 6 or 7) with the level of service provided by Scottish Water, the percentage has increased from 86% in 2018, to 100% this year (86% in 2017, 92% in 2016). Alike, the mean score has increased from 5.2 in 2018, to 5.8.



'On the whole, they're great. There are areas for improvement. They could address some of the basic fundamentals that have been raised by the industry for quite some time such as; listening to the market more, lack of action in some areas.' (Pure (CGV) Limited)

'Out of all wholesalers we work with, they've been operating the longest. They have all their processes down to a T. Their response times and the way that they deal with billing is good. The only reason I didn't give them a 7 is the fact that we don't do a huge amount with them, so each time we do, we have to relearn what to do or who to contact. But overall very positive. If we did more in Scotland, we'd have a closer relationship which would push the score up.' (The Water Retail Company)

'They're helpful, they sort things out. In regards to the reconciliations, we get the money back a month after when we've already reimbursed the customer. That could improve. The inter-departmental communication could be better.' (Blue Business Water)

'I've worked with them for so long, I've built up such a great relationship with them and we have really good communication. I've had never had an issue. They're very approachable. I might not agree with everything, but we are able to agree to

***disagree. I've got confidence that I can pick up the phone and speak to any one of them.'* (Water Plus)**

Overall, similar to previous years, SW is deemed as proactive, flexible, willing to listen and generally solution focussed. Since last year, large areas of improvement have been noted by many of the LPs.

Any frustrations that arise, remain similar to previous years: internal communication between teams within Scottish Water, and the quality of some team's responses.

Generally, across the board, LPs appear to have a much more positive perception of the teams this year, with most issues mentioned being minor. However, despite frustrations being minor, these can have an impact upon mean scores (because the sample pool is small).

In terms of which teams are driving overall satisfaction, the sample is deemed too small to conduct any meaningful correlation analysis.

Consistent to 2018, the proactive nature of Scottish Water is highlighted by the opening of the English and Welsh non-household water market, whereby Scottish Water's experience and attitude is compared favourably to other wholesalers. Just under half of all LPs who took part (42% / 5 LPs) believed Scottish Water compared favourably to other wholesalers in England and Wales. A further 42% could not determine how Scottish Water compare as they don't operate in the other markets. No LPs believed they performed worse comparable to other wholesalers.

***'Scottish Water are at the top in our eyes. They've been in the market for such a long time. They're not fearful of anything, unlike other retailers and they come back on things much quicker. Scottish Water are more confident in their knowledge when you challenge them, and they stick to SLA's more.'* (Water Plus Limited)**

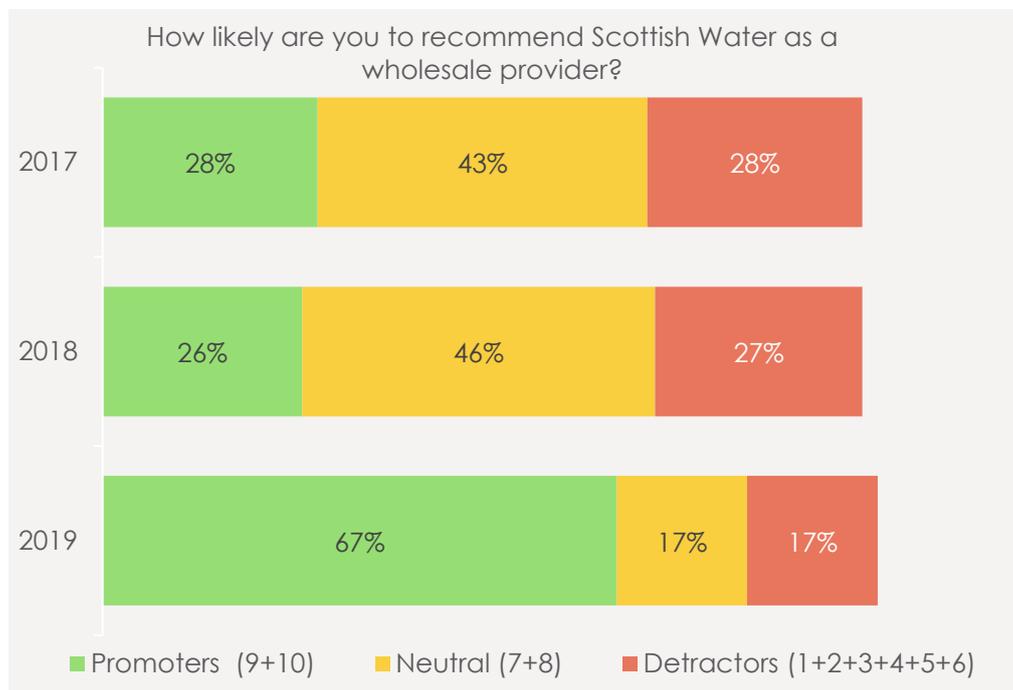
***'Scottish Water are performing the same as the other good wholesalers in England and Wales. Anglian Water are quick at coming back and its portal is good at pushing information out. Bristol Water is a small company but meet all of its deadlines and SLAs -It is the highest performing in terms of compliance with SLAs.'* (Anonymous)**

***'Scottish Water are better than some wholesalers in England and Wales. United Utilities are on a par with SW as they both have a pragmatic solution to things, a flexible approach and are keen to work with you. It would be good to get SW involved/working with some of the industry bodies / working groups in England and Wales to help practical aspects.'* (Wave Limited)**

5.2 NPS

The number of LPs who were 'promoters' of Scottish Water increased dramatically in 2019, with over two thirds (67%) of LPs falling into the promoter bracket. In correlation to this, the proportion of detractors decreased this year.

By using the likelihood to recommend question, we are able to calculate the Net Promoter Score (NPS). Promoters are respondents that give a rating of 9 or 10, neutral respondents give a rating of 7 or 8 and respondents giving a rating of 1 to 6 are detractors. To compute the net promoter score, the % of detractors is subtracted from the % of promoters. A positive score indicates that the number of promoters outweighs the detractors, whereas the opposite is true for a negative NPS score.



Sample = 13

***'If comparing to others, Scottish Water are a good model to follow.'* (Wave Limited)**

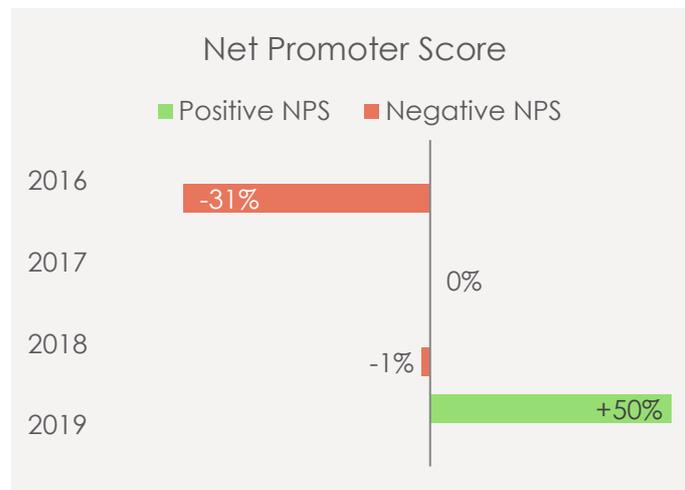
***'Compared to other utilities they are a very good company to work with. They appear to make an effort to make things easier for us and do a good job for the customers. The service is very good. Scotland's water market is envied by many countries around the world, SW are behind that. They make the effort to carry out surveys and audits and ask people questions, not just about technical stuff, they ask about environmental impact etc. They're an excellent company and should be very proud of themselves.'* (Commercial Water Solutions Limited)**

***'I would recommend them if another retailer wanted to go into the Scottish market. In some cases, they're easier to work with than other retailers in the English and Welsh market. They're easy to deal with.'* (Anonymous)**

***'We have a good relationship with Scottish Water. They're supportive. They've remained consistent with their Account Managers, whereas other wholesalers in England and Wales have chopped and changed. Scottish Water have a core structure which is down to experience and the length of time that they've been in the market.'* (Clear Business Water Limited / Aimeria Limited)**

Following the number of promoters, the NPS has improved considerably.

In 2019, the NPS reflects a positive score of +50%. Therefore, the number of promoters outweighs the number of detractors. Whereas, this is not true for previous years (-1% in 2018)

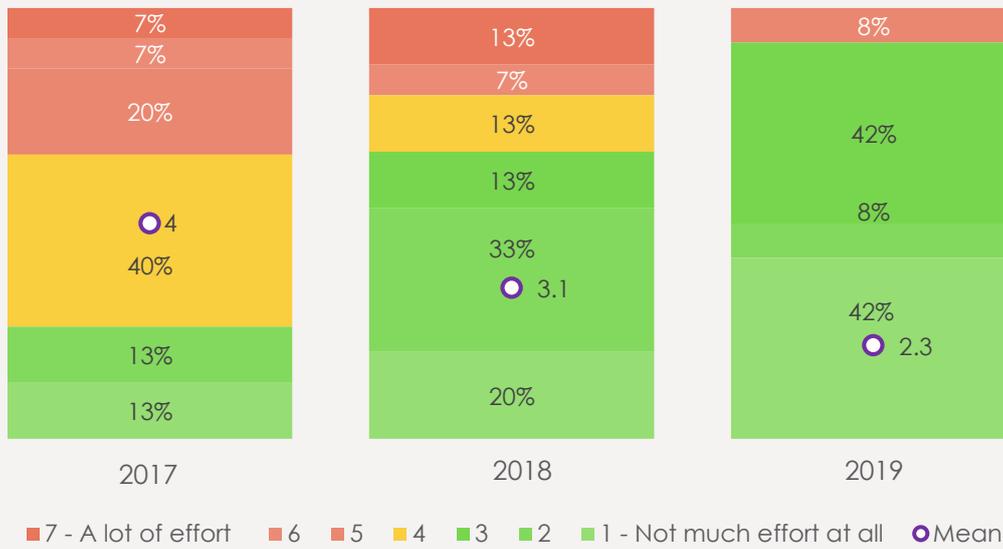


5.3 Personal Effort

Personal effort scoring measures how much effort an LP has to make in order to interact with Scottish Water. It is scored using a 7-point scale where 7 = a lot of effort and 1 = not much effort at all.

The lower the score, the more positive the outcome. Encouragingly, from the following chart we can see that there has been a large increase in the number of LPs giving a score of 3 or less (92% in 2019, compared to 66% in 2018). One LP gave a high score of 5, reflecting their frustration in the amount of time required by LPs to sort some aspects out.

Taking into account all aspects you interact with at SW, how much personal effort does this require from you?



Sample = 13

***'Scottish Water take quite a lot of the work away from us. The portal works well and has aided us.'* (Wave Limited)**

***'For me, the spreadsheets and databases could be quicker to use. Things could be done in fewer steps. Anytime you call, they want to know your name, address and phone number. I get frustrated by that, it's a waste of time.'* (Commercial Water Solutions Limited)**

***'Most things are intuitive. If there's anything we aren't sure about, we can go to Chris (Account Manager) to get help.'* (Anonymous)**

***'Because they're trying to make sure the market data is as up to date as it can be, things are constantly changing. Everything that comes from a customer requires us to raise. Some customers go to SW if they have an issue and SW will tell them they have to go through their LP, the customer might not know who their LP is. This can make things take longer for customers and they can get irate. This can be quite difficult.'* (Clear Business Water / Aimeria Limited)**

6. Licensed Provider Satisfaction with High Priority Areas and Teams

As already indicated earlier, there are a number of service areas within Scottish Water that had greater stated LP interaction than others. These were:

- Wholesale Service Desk
- Metering Services
- Customer Revenue - Wholesale Billing
- Wholesale Account Management
- Customer Revenue – Exemptions and Allowances
- Development Operations
- Trade Effluent

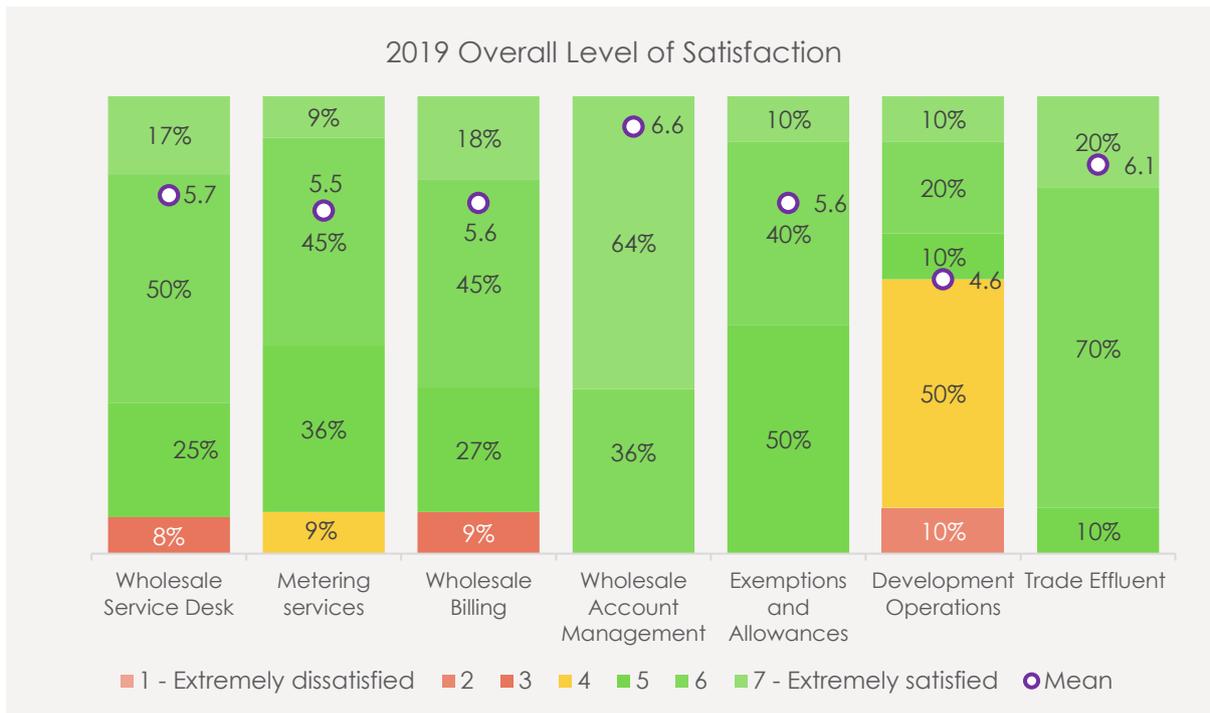
The above definitions have been kept consistent with the last three years to allow for comparison.

6.1 Levels of satisfaction, ease of interaction and quality of responses

Much like previous years, Account Management gained the highest mean satisfaction score (6.6). Furthermore, the average satisfaction score is notably higher in 2019 (6 in 2018), with all of LPs giving a high score of 6 or 7 and more than half of LPs giving a top-box score of 7 out of 7.

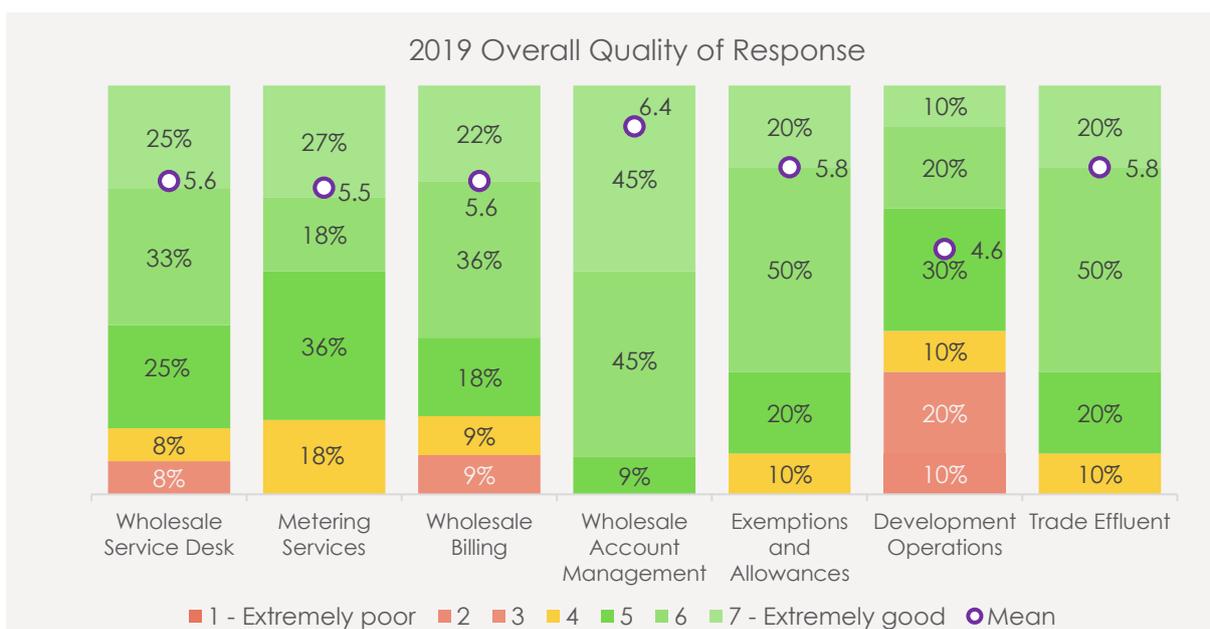
Similarly, the Wholesale Service Desk saw an increase in their mean score since 2018 from 4.8 to 5.7 in 2019, as did Customer Revenue – Wholesale Billing, with their mean score improving from 4.8 to 5.6.

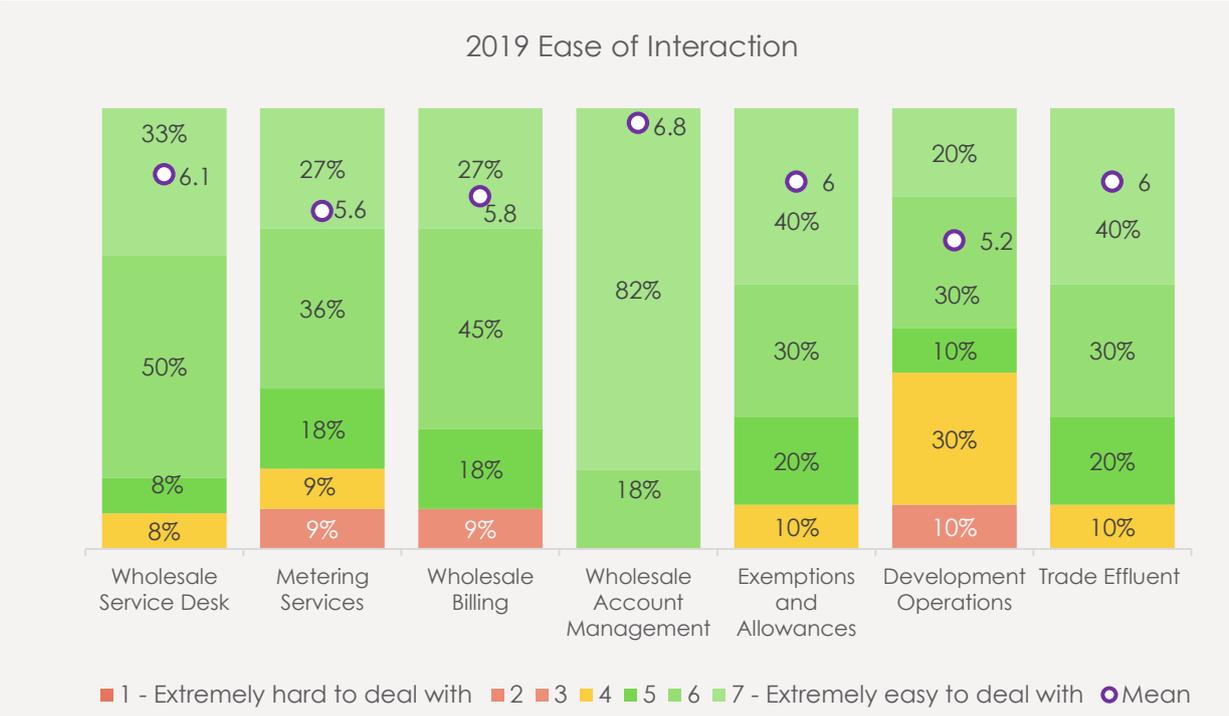
Exemptions and Allowances, Trade Effluent, Metering Services and Development Operations all moved from medium priority teams to high priority teams in 2019. Trade Effluent also performed well in terms of satisfaction, achieving a mean score of 6.1, with all LPs giving a score of 5 or more. This was also the case for Exemptions and Allowances.



Metering Services improved their mean satisfaction score from 5.3, to 5.5, with a higher proportion of positive scores given in 2019, and no negative scores recorded. Development Operations saw improvement in mean score for satisfaction, from 4.0 to 4.6. However, half of the LPs gave a neutral score for this team, with one LP giving a low score, highlighting their frustration with the team.

The following charts highlight LPs perceptions of the quality of responses and ease of interaction with each team. Overall, the scores largely mirror each other. The Wholesale Account management achieves a higher mean score for quality of responses than other teams.

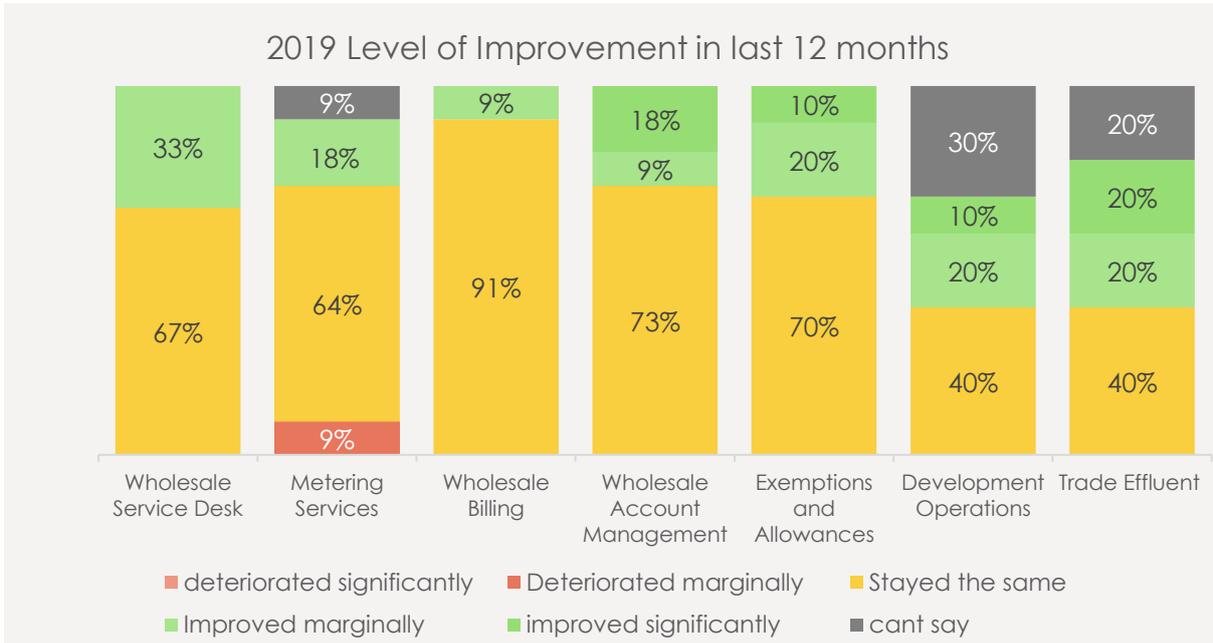




In 2019, all teams have encouragingly seen increases in mean scores across these two aspects, besides Trade Effluent who saw a slight improvement for ease of interaction, whilst the teams mean score for quality of response remained consistent with 2018.

The greatest increase was witnessed for Development Operations of +0.8 for ease of interaction and for quality of responses. Despite the team's improvement across the past 12 months, frustration towards Development Operations is still evident, which is having a clear impact on the team's overall satisfaction score.

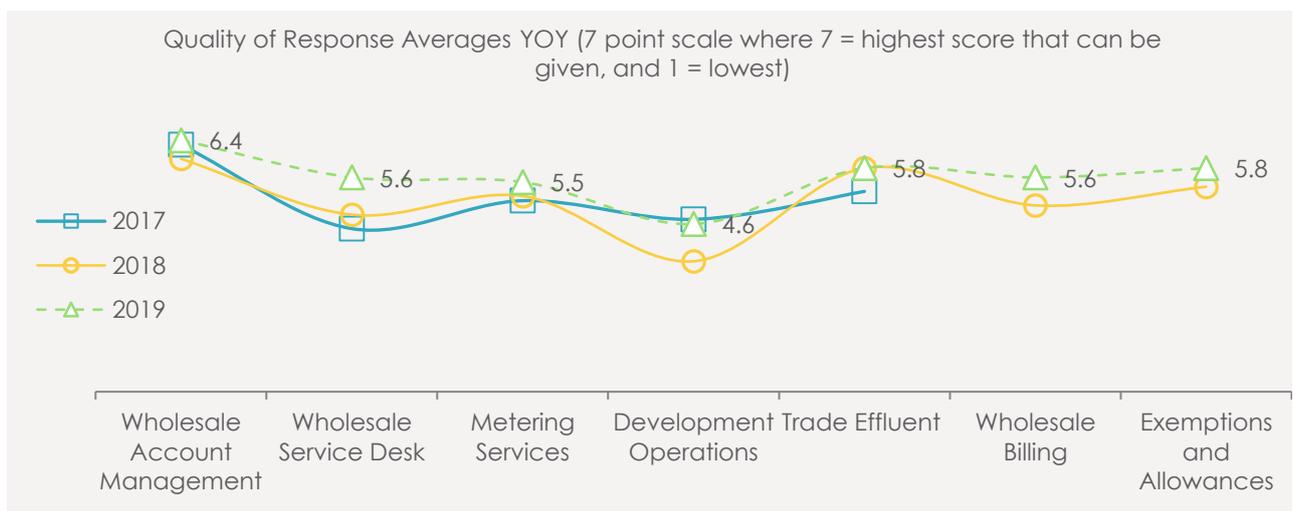
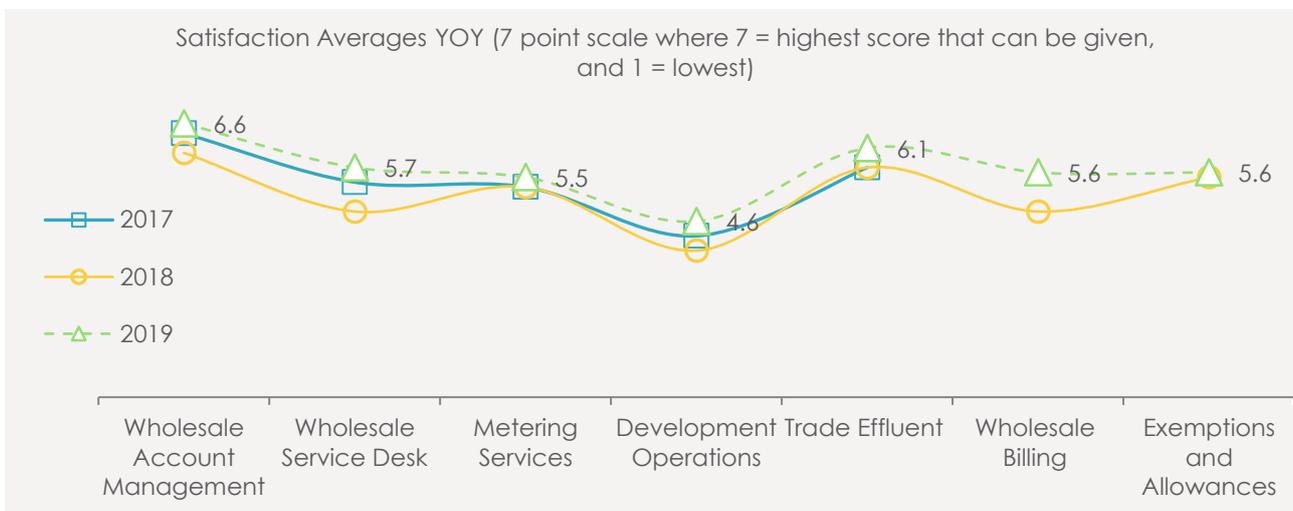
Looking towards improvements in the last 12 months, in the majority of cases, LPs reported teams had 'stayed the same'.



Encouragingly, improvements were perceived across all seven teams, with most significant improvements evident in the Trade Effluent team. One LP stated that Metering Services had 'deteriorated marginally.'

The following charts plot the mean scores across the last three years for directly comparable teams (Wholesale Billing and Exemptions and Allowances were split last year and so have only been compared to 2018).

Given small subsamples, any shifts should be viewed with caution, however the most consistent improvements for high contact teams, were noted for the Wholesale Service Desk and Development Operations. Whilst this is positive, there are still frustrations with these teams which will be seen later in the report, and should be taken on board, however improvements appear to be starting to make some impact.



Ease of Interaction Averages YOY (7 point scale where 7 = highest score that can be given, and 1 = lowest)



The table below shows the combined satisfaction scores for the individual teams between 2017 and 2019. The Wholesale Service Desk, Metering Services and Wholesale Account Management saw improvement across all three areas. Whilst achieving increased satisfaction and quality of response, Exemptions and Allowances saw a fall in ease of interaction. Development Operations combined satisfaction scores decreased for all elements this year.

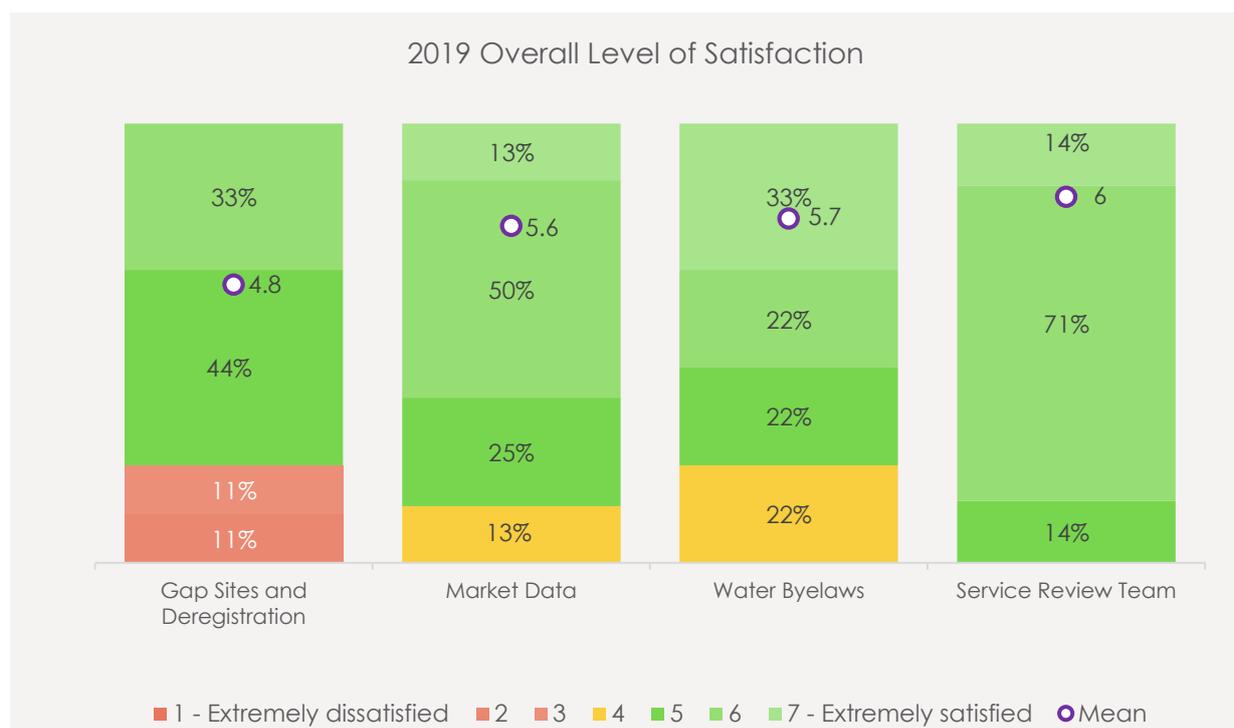
Combined scores (scores of 5+6+7)	%	Overall Satisfaction			Quality of Responses			Ease of interaction with		
		2019	2018	2017	2019	2018	2017	2019	2018	2017
Wholesale Service Desk		92%	67%	79%	83%	74%	42%	92%	84%	79%
Metering Services		91%	77%	78%	82%	66%	64%	82%	77%	71%
Account Management		100%	93%	94%	100%	93%	94%	100%	93%	100%
Development Operations		40%	51%	42%	60%	75%	50%	60%	76%	42%
Trade Effluent		100%	100%	100%	90%	90%	67%	90%	90%	74%
Wholesale Billing		91%	67%	-	82%	75%	-	91%	83%	-
Exemptions and Allowances		100%	91%	-	90%	82%	-	90%	91%	-

7. Licensed Provider Satisfaction with Medium Priority Areas and Teams

This year highlighted teams with reasonable levels of contact with LPs having been used by between 50%-75% of them in the past 12 months.

- Customer Revenue – Gap Sites and Deregistration
- Market Data – Wholesale Transactions and Proactive Premises Management Team
- Water Byelaws
- Service Review Team

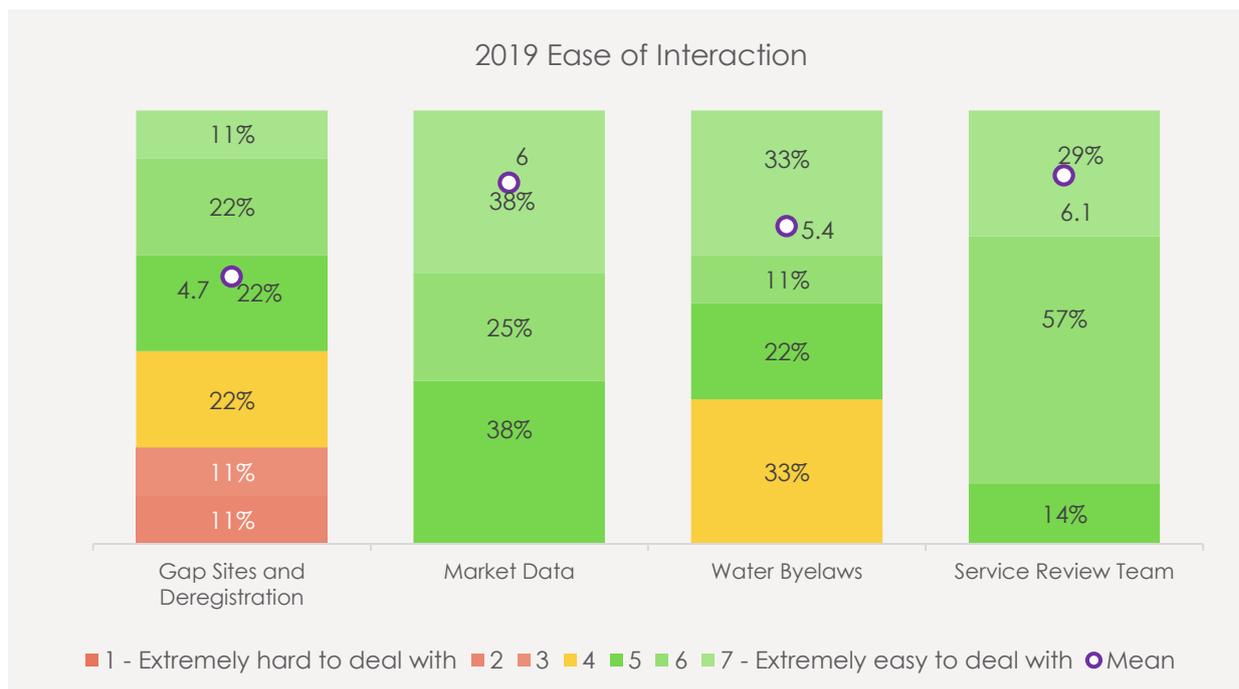
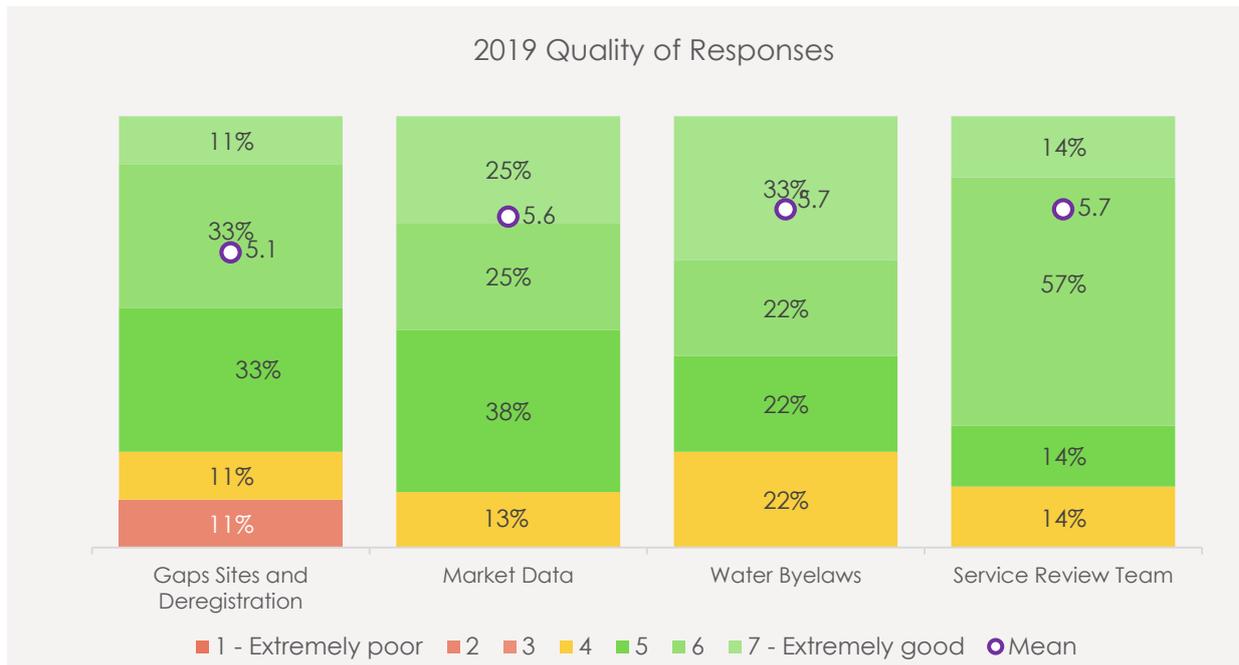
7.1 Levels of satisfaction, ease of interaction and quality of responses



The Gap Sites and Deregistration team gained the lowest mean average satisfaction score amongst the medium priority teams in 2019. The Service Review Team scored the highest, although Water Byelaws was most typically awarded the top-box score of 7 out of 7, comparative to other teams.

In 2019, Market Data saw the most improvement for mean score of satisfaction by +1.7 (3.9 in 2018).

The following charts highlight LPs perceptions of the quality of responses and ease of interaction with each team.



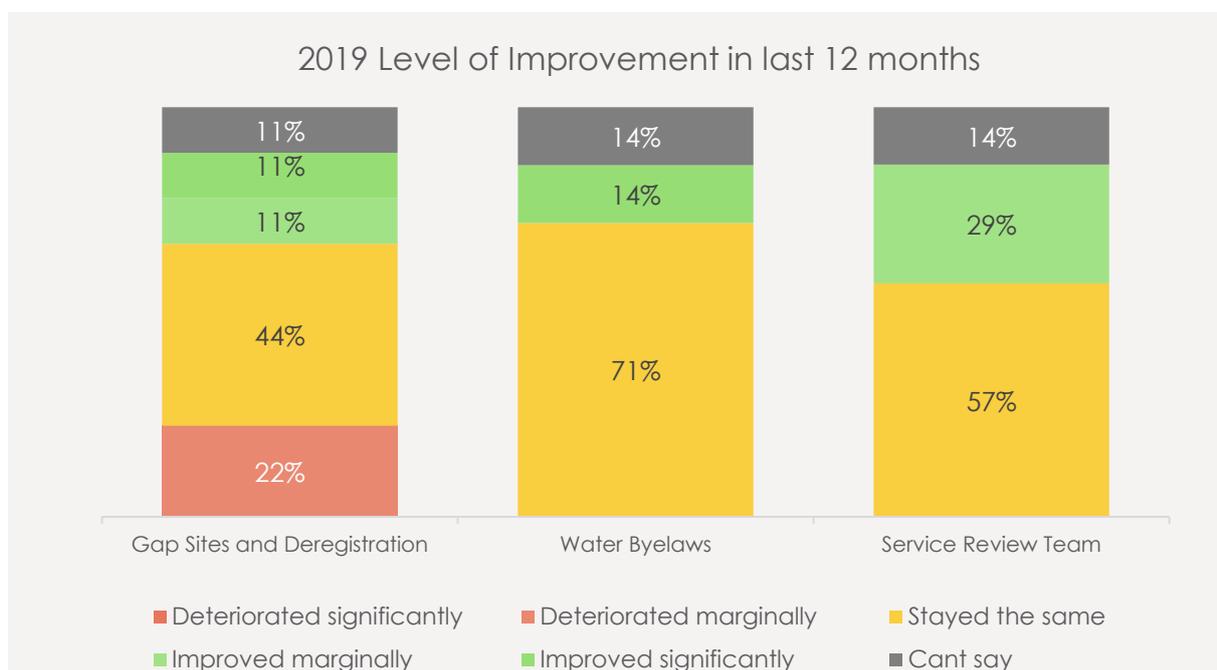
Following on from the satisfaction scores, both Water Byelaws and the Service Review Team scored the highest for quality of response. The Service Review Team also scored the highest for ease of interaction, closely followed by Market Data.

The lowest performing team in these areas was Gap Sites and Deregistration. Although this team saw slight improvement in quality of response, it achieved a lower score for

ease of interaction this year, giving it the lowest score for this element across all 11 teams.

Comparing to 2018, most of the teams scored more positively in 2019, witnessing some incremental gains. The Service Review Team saw a -0.6 fall in the mean score of quality of responses from LPs in 2019, However, they do appear easy to interact with, with an increase of +0.1 reported.

Improvements were most widely recognised for Market Data, with quality of responses improving by +1.2, and ease of interaction seeing improvement of +1.5 since 2018. Improvements were also demonstrated by Water Byelaws across both elements.

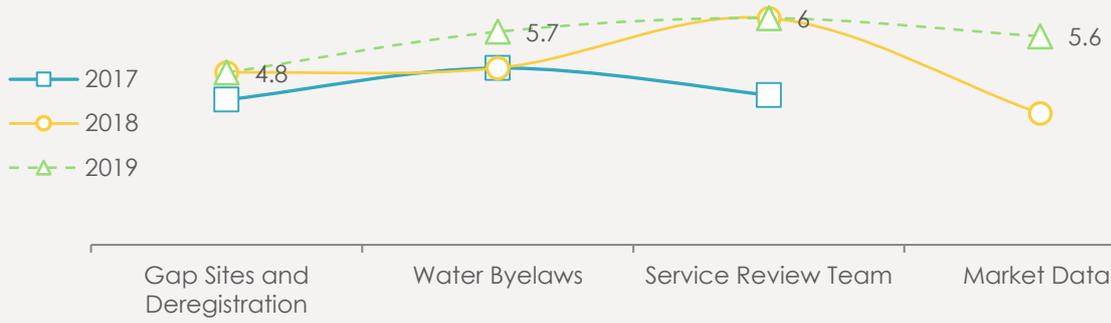


Looking at the level of improvement above, within the last 12 months, The Service Review Team saw the most positive shift, with 29% of improvement recorded.

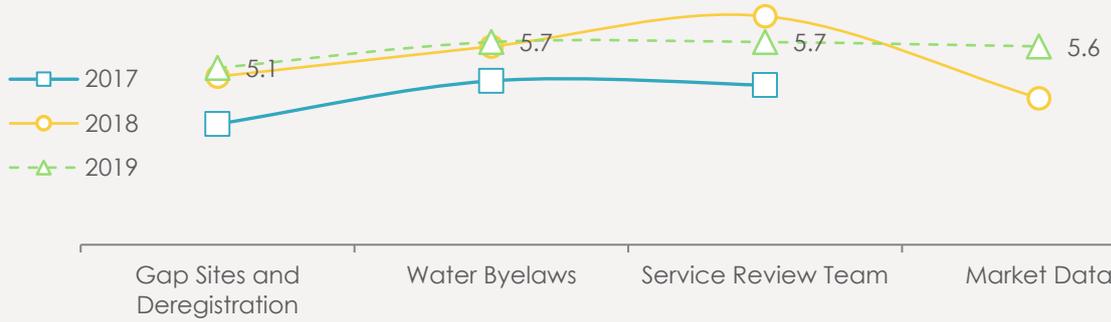
Gap Sites and Deregistration were the only team in which a negative shift was noted by LP's in terms of how the team has changed over the past 12 months. Given small subsamples, any shifts should be viewed with caution.

The following charts illustrate the mean scores of teams where comparisons can be made to previous years. Market Data has seen considerable improvements for mean scores since being introduced in 2018.

Satisfaction Averages YOY (7 point scale where 7 = highest score that can be given, and 1 = lowest)



Quality of Response Averages YOY (7 point scale where 7 = highest score that can be given, and 1 = lowest)



Ease of Interaction Averages YOY (7 point scale where 7 = highest score that can be given, and 1 = lowest)



The table below shows the combined satisfaction scores for the individual teams across the last three years. An increase in scores for satisfaction was achieved across all teams in 2019. Water Byelaws and Market Data saw improvement in all aspects, with the latter's scores increasing considerably since last year.

Most areas have increased scores for ease of interaction with the exception of Gap Sites and Deregistration, although the decrease in score is marginal. All teams saw improvement in quality of response, besides the Service Review Team.

Combined % scores (scores of 5+6+7)	Overall Satisfaction			Quality of Responses			Ease of interaction with		
	2019	2018	2017	2019	2018	2017	2019	2018	2017
Gap Sites and Deregistration	78% ↑	51%	69%	78% ↑	66%	46%	56% ↓	58%	31%
Water Byelaws	78% ↑	66%	66%	78% ↑	77%	73%	67% ↑	66%	75%
Service Review Team	100% ↑	75%	67%	86% ↓	100%	67%	100% ↑	75%	50%
Market Data	88% ↑	40%	-	88% ↑	60%	-	100% ↑	60%	-

8. Detailed Perceptions of High Priority Service Areas

8.1 Wholesale Service Desk

The Wholesale Service Desk (WSD) once again performed well in the last 12 months, with an improvement of mean scores. Consistent to previous years, the key strengths of the WSD are the personnel who are deemed easy to deal with, polite, helpful, and friendly.

There were a couple of suggestions that the introduction of the portal has led to fewer interactions between LPs and the team. One minor comment made by one LP was that their relationship with the team has been taken away because of the portal. However, the portal is generally perceived positively.

There was one LP who had a slightly more negative view of the WSD, and consequently scored the team low. This was mainly felt to be due to communication. The LP lacks confidence in the answers she receives from the team and highlighted an incident in which the team didn't do what they said they were going to do.

However, most other LPs have a positive perception regarding the communication and response times, with the general consensus being that the team are extremely easy to contact.

Positives of the WSD Similar to previous years	Improvement opportunities for the WSD Similar to previous years
<p>Staff are friendly and polite and generally helpful.</p> <p>Generally easy to contact</p> <p>Generally always respond.</p> <p>Proactive in trying to find a solution to issues.</p>	<p>Response times can be a bit mixed</p> <p>Sometimes there is a need for further information / investigation.</p> <p>Lack of knowledge on specific areas / understanding, which means you don't always get the answer you need. Some LPs feel this is down to high staff turnover.</p> <p>Lack of liaison between WSD and some other departments.</p>

Positive Comments from LPs:

'They are at the other end of the phone if I need them. Even if they do not know the answer straight away, they will find it and come back to me'. (Water Plus Limited)

'They're very knowledgeable and they answer a lot of queries directly themselves which is a big help. They are very easily contactable. You get a good quality answer from them. They're very good at getting us the answers we need, and they respond quickly.' (Wave Limited)

'They're very responsive. Their customer service levels have gone up a lot. They're more proactive in trying to find an answer or solution or resolution for you. They have improved in that area.' (Castle Water Limited)

They're polite and try their best to assist. I value being able to talk to a human, not all teams have this.' (Clear Business Water / Aimera Limited)

'The communication by email is good. If you put in a query you get a quick response to say they've received your query. You do get a response and generally get all of the information you need, as long as you don't require an answer urgently.' (Commercial Water Solutions Limited)

Potential Improvements from LPs:

'If they don't know the answer to a question, they'll ask a colleague, but instead of putting me through to a colleague with better knowledge, they'll relay the question and the answer that comes back is completely different to what I asked. I don't have confidence in their answers. They should put you through to someone who knows the answer if they don't know it themselves.' (Blue Business Water Limited)

'When queries are more complex and we ask for a decent explanation, sometimes it can be a bit lacking, or it raises more questions than answers.' (Anonymous)

'Communication with them has been taken away because of the portal, I used to know all the guys on the WSD and used to speak to them on a daily basis. There are new members of staff. I expect to know the person at the end of the phone and the knowledge of us as an organisation is not as up to speed. I used to have a really good relationship with the team which has been lost because of the portal.' (Water Plus Limited)

'They lack knowledge on specific areas, although I recognise its difficult. You don't always get the information you need on the first call; someone will get back to you. There's a lack of clearing. Communication with other departments such as; Connection Teams and Gaps could be improved.' (Clear Business Water / Aimera Limited)

'Staff get to a certain level of training and then they get moved on / promoted and they bring in new staff which affects the performance. They have a tendency to jump the gun; they don't analyse and investigate what's requested of them. They're quick to reject jobs rather than investigating it more thoroughly.' (Castle Water Limited)

8.2 Metering Services

Metering Services performance has seen improvement across the last 12 months. However, experience of this team can be mixed with some having great experiences and others poor.

A couple of LPs highlighted issues regarding the third party (Clancy Docwra in particular). Issues raised are again around onsite visits, with some customers / LPs not being notified of appointments and the impact that the work may have. One LP cited that the quality of work was poor and that the third party can be rude. However, compared to a few years ago, third party issues are less often mentioned.

Positives of Metering Services	Improvement opportunities for Metering Services
<p>Quick resolution generally. One LP cited that they're quicker than some of the other wholesalers in England.</p> <p>The internal team generally works well.</p> <p>The portal seems to have made improvements in terms of the forms.</p> <p>Generally provide good / useful information</p>	<p>How long it takes to decide if a meter is being exchanged.</p> <p>Unable to make direct contact with contractors.</p> <p>Again, consistent to previous years, some end user customers need better prewarning of appointment times and the impact the work may have.</p> <p>Sometimes there is a need for more detailed information.</p>

Positive Comments from LPs:

***'They're pretty fast. If we have any problems (e.g. a meter smashed) it's generally sorted within a week. They come back to us with good information. A meter fault repair job has an SLA of 32 days, so to get a response back within a week is really good.'* (Castle Water Limited)**

***'The meter replacement project has always been a great success. It's been going on for years and will continue to do so. No issues from customers or ourselves. Everything ticks along nicely. Faults and repairs are attended quickly, and LPs are updated.'* (Clear Business Water Limited / Aimeria Limited)**

***'SLA's are always kept within the timescales. I've never got any worries at all. I'm confident this team will meet what they say they'll deliver. SW will come back to me. I used to have quite a lot of issues with contractors a few years back, now they have new contractors there's no issues. The contractors have really improved.'* (Water Plus Limited)**

'The internal team works well - filling in forms on Ascend. On the whole its great. Before Ascend (LP portal), forms were really badly put together, we didn't know which forms to fill in. All sorted out, a lot better than it used to be.' (Commercial Water Solutions Limited)

Potential Improvements from LPs:

'A couple of times they've had to send technicians out to confirm that the meters stopped working before sending somebody else out to replace it. They should upskill technicians so that they can replace it at the same time to speed up the process for the customer and for themselves – saves money, better outcome.' (Anonymous)

'The issues are with the third party (Clancy). We provide them with contact details for arranging appointments and making customers aware of the impact the work might have, and they don't make any of those calls. There's no ability to directly ask questions. SW have remote areas, therefore it's quite difficult to access / get the job done. SW have to bulk the jobs up in those areas, which makes things take longer.' (Wave Limited)

'The real problem is the third party (Clancy Docwra), they do a poor job of installing the meters, they can be rude/grumpy. We have no control over the third party.' (Commercial Water Solutions Limited)

'Where there's complex site visits required, we're charged unnecessarily. They tell us information but don't give us a conclusion on what it means. When it's a straightforward fault/repair they're great, but when it comes to complex issues we struggle. They give a lack of detail. There are multiple metering issues that need to be changed. I understand that its complicated but if we're all on the same page we can make it work.' (Clear Business Water Limited / Aimer Limited)

8.3 Customer Revenue – Wholesale Billing

On the whole, this service area performed reasonably well in 2019, with improvements seen across all aspects.

Most LPs seem to have little to gripe about with this team. Minor issues are mentioned, but on the whole processes seem to have been implemented to resolve many issues.

Positives of Wholesale Billing	Improvement opportunities for Wholesale Billing
<p>Quick to respond.</p> <p>Good communication.</p> <p>Collaborative working</p> <p>Willing to help.</p> <p>Timely / Accurate invoices.</p> <p>Not too many issues.</p>	<p>There is lack of referencing to SPIDS – difficult to reference jobs.</p> <p>Although helpful, weekly statements can be perceived to be excessive.</p> <p>Some of the processes are complicated and time-consuming – e.g. individual spreadsheets for different teams.</p> <p>There have been a couple of incidents where LPs had to chase.</p> <p>Sometimes unnecessary charges are added.</p>

Positive Comments from LPs:

'The communication is great. If we have a problem, we let them know and they get it resolved very quickly.' (Anonymous)

'No issues with this team at all, they're absolutely great. If we need to address anything, we'll talk to direct point of contact and sort it. They will tell us if there's any incorrect information on a bill. Good two-way communication.' (Water Plus Limited)

'They listen to us. We've worked collaboratively to turn around something that was a bit of a pain for us. Now we've found our feet and have got a process in place. We came to an agreement which we're both happy with. There is a mutual understanding of constraints on either side.' (Clear Business Water Limited / Aimeria Limited)

'Good service, accurate bills. When we have queries, we get answers back quickly. We're working closely with that team at the moment on some particular charges and they've been very helpful and prompt and given us updates. Better than some of the

other wholesalers on that front. They do the basics well; bills are always on time and accurate and we have had very few incidents where we've had to go back and query where the charges were calculated wrong. All you can really ask for.' (Wave Limited)

'Acknowledgement of revenue payment. The bank details are clearly laid out. The process works well - statements sent out on weekly basis (every Friday), really useful.' (Anonymous)

Potential Improvements from LPs:

'Some of the processes make it more difficult and time consuming - spreadsheets of invoices e.g. They send individual spreadsheets for different teams. I've asked them to collate these into one big spreadsheet, but they're unable to because of the system they use, this creates more work for us. They should put in a way of changing that. It's complicated and time consuming.' (Clear Business Water Limited / Aimeria Limited)

'We've had couple of incidents where there has been some billing issues / we didn't get some invoices, or we've had to chase.' (Anonymous)

'Weekly statements are a bit over kill and unnecessary, but I can see that this may be beneficial for other retailers who are doing more with them (SW).'(Anonymous)

'Lack of referencing to SPIDs means it's tricky and time-consuming to reference jobs. I want to open a bill and have each of the jobs listed with the SPID and the total it was charged.' (Blue Business Water Limited)

'The willingness to add charges without previous investigation. They're keen to add a charge on (unnecessarily) and it's a struggle to get those charges back. They'll challenge it and question whether we're right. It takes quite a long time. It is quite frustrating.' (Castle Water Limited)

8.4 Wholesale Account Management

Similarly, to previous years, the Wholesale Account Management team were the top scoring team across all aspects of the evaluation process, with further improvements in 2019.

Once again, the support provided by Account Managers is highly praised amongst most LPs. The only negative feedback was related to Scottish Water as a whole.

Positives of Account Management	Improvement opportunities for Account Management
<p>Well managed and professional.</p> <p>Provide useful / relevant information.</p> <p>Very supportive and committed to solving any outstanding issues.</p> <p>Very approachable.</p> <p>Very prompt to respond.</p> <p>Knowledgeable team.</p>	<p>One LP noted that if their customer base in Scotland grew in the future, they would expect more contact and a closer relationship with the team. However, doesn't deem this necessary at the moment, given the volume of customers.</p>

Positive Comments from LPs:

'I couldn't think of anything more that they could do. We have regular formal meetings with them, the minutes always come back quickly, and they action everything quickly. They're very knowledgeable. Handovers have been good. The new Account Manager is fantastic. They have a good mix of experience and are a good source of information. If we're unsure on anything we can contact them, and they'll give us a sensible approach of what we should do next. Meetings are structured and agenda is planned in advance.' (Wave Limited)

'She immediately deals with any email I send her (Account Manager). Her communication is really good, she always informs me if she's going on holiday and who I should contact. Always willing to find things out and ask other departments. She makes sure that nothing slips through the gaps - has a list of all the jobs and reminds me of things. She's very approachable and helpful. She goes out of her way to keep communication open.' (Blue Business Water Limited)

'They sort out any issues. If something is not getting resolved, we know we can always go to them and they'll get involved and resolve it or point us in the right track to get it resolved.' (Anonymous)

***'Information is relevant and useful to receive. Chris is our third Account Manager - hand overs have always been good. The old Account Manager will inform us that they're leaving and copy in the new one. The new Account Manager will send a follow up email to introduce themselves. Really well managed and professional. We only started trading in Scotland in 2017 – there's been quite a high turnover of Account Managers, but this hasn't felt disruptive because of the way they managed it. Really good.'* (Anonymous)**

Potential Improvements from LPs:

The belief is that no real improvements are to be made by this team, although one LP stated that if they increased business in Scotland, they would expect the relationship between themselves and Account Management to improve.

***'If circumstances changed (more customers in Scotland), I would expect more contact and a closer relationship. But there's no need at the moment.'* (Anonymous)**

8.5 Trade Effluent

Scores for the Trade Effluent team remained consistently high across most aspects again in 2019, with some improvement being noted for satisfaction and quality of response. They scored the second highest for satisfaction this year.

Trade Effluent saw the most positive shift in terms of changes over the past 12 months, with 40% of LPs seeing improvement in this team. LPs seem to praise them for their communication and ease of contact.

There were several negative comments made about this team. However, a couple of LPs cited that these were only minor issues.

Positives of Trade Effluent	Improvement opportunities for Trade Effluent
<p>Generally felt to be communicative and helpful by most.</p> <p>Prompt, good quality responses.</p> <p>LPs find this team very helpful in guiding them through, what can be, a complicated area.</p> <p>Easy to contact – dedicated email.</p> <p>Generally felt to be a quick process.</p> <p>Portal improvements cited by a couple of LPs'.</p>	<p>One LP stated that they have to go back and forth to complete the work – info missing from portal.</p> <p>Some would like to be able to scan and email G02 forms (like other Wholesalers) for ease – currently have to post.</p> <p>One LP believes they would benefit from a training session.</p> <p>One LP expressed their frustration with the length of time it takes for them to complete the final step of the process.</p>

Positive Comments from LPs:

'I've learnt a lot from them. I receive everything in advance. The communication is very good. I have a really great relationship with everyone in the team, you can pick up the phone and they'll sort any issues out. They're really helpful, and great for talking you through the portal and what information is required.' (Water Plus Limited)

Their team manager is very hands on and is very good, very thorough. Whenever you drop her an email or give her a call, she is 100% on the ball, and for me that makes up for some of the shortfall in the responses. I'm now in a far better place with Trade Effluent than I've ever been in all my time. The team has made a miraculous U-turn' (Castle Water Limited)

'The processes and portals work well. We have specific people that help and their number that we can call if we have any urgent queries.' (Clear Business Water / Aimeria Limited)

'The guys in the team are helpful. We can contact them directly. Trade Effluents have to submit a formal application which should be the starting point, but they do some preparative stuff before the application is approved. They have a pragmatic approach to the job and are very willing to speak to customers.' (Wave Limited)

Potential Improvements from LPs:

'They require a signed hard copy in the post, which is a burden. Other wholesalers accept a scanned copy sent electronically.' (Anonymous)

'There's no consistent information regarding the trade effluent risk of the consent, which determines the bill. We have to make additional contact to complete our side of the work, rather than the details being on the portal' (Scottish Water Business Stream Limited)

'A training session may be beneficial; meeting the team, going through the nitty gritty and what makes up the charges.' (Clear Business Water Limited / Aimeria Limited)

'The final step of the transaction takes too long. the case can be closed but we're not informed. I spent two months chasing a meter to be uploaded onto the CMA so they could start billing the customer; that has a knock-on-effect because it's backdated. When I tried to chase them, I wasn't getting a very good response. They could be a little more forthcoming when they're coming to the resolution.' (Castle Water Limited)

8.6 Development Operations

Comparative to other teams, this team has perhaps always scored lower across most aspects in previous years. This year, the combined satisfaction scores totalled just 40% of LPs, down from 51% in 2018. Development Operations had the lowest mean score for satisfaction and quality of response and scored the second lowest for ease of response in 2019.

However, the team saw a positive shift in terms of changes in the last 12 months, with 30% of LPs seeing improvement.

Unfortunately, whilst there may have been improvements since the opening of the market (2008), this team still has the same frustrating issues for LPs. It is not on the portal just yet, but a couple of LPs did mention their awareness of changes afoot for this team, which they were hoping would help change things.

Positives of Development Operations	Improvement opportunities for Development Operations
<p>Individuals within the department are generally helpful, friendly and approachable.</p> <p>Positive changes are being recognised by many LP's.</p> <p>Mixed opinions around response times.</p>	<p>Whole process and system is too long. More information and clarity on process and the timescales from start to completion is required.</p> <p>One LP cited that there are inconsistencies in the data they request.</p> <p>Don't always respond quick enough.</p> <p>LPs often have to chase this team.</p>

Positive Comments from LPs:

'Quotes are coming back faster. SW are keen to help rather than preventing progress which is good. Staff knowledge and attitude is really good. They provide good updates. There have been improvements since last year. Our working relationship is good, they're always willing to help. They try their best and if they can't help, they find someone that can.' (Wave Limited)

'We asked for checklist so we can inform customers what is required from them and are working together on that. They're setting up a portal which will be very beneficial and will help with time. We're seeing changes within the team and are looking forward to the new portal coming into play, so we have everything in one area.' (Clear Business Water / Aimeria Limited)

'Straightforward and easy.' (Anonymous)

'They have improved over the last 6 months. They're logging our requests now, making sure we understand what's going on, they're better at getting back to us with information.' (Castle Water Limited)

Potential Improvements from LPs:

'The whole communication is wrong and the data that they request is inconsistent. Even the letters they send you are inconsistent; they put numbers on the letters that don't work anymore. The forms you fill in don't work. There's no clarity on what they want. Lots of frustration all around.' (Commercial Water Solutions Limited)

'Everything is not under one roof. We need more assistance on cases; all cases are different when it comes to connections so it would be good to have someone who you can go to and ask for advice. This would be big benefit because we have to speak directly to the customer rather than SW, but SW have all the knowledge. A SW 'guide to' would be ideal for us to provide to the customer.' (Clear Business Water / Aimeria Limited)

'There were delays to a particular job that a colleague didn't get a response on. He was waiting for SW for a while and chasing it up. This caused time delays that had a knock-on effect on the customer. It's magnified a bit with the developer's team because of the nature of the job. SW advise us to contact case owners separately, but often we have to chase it up and when you do there's not always a result. Sometimes SW don't always respond quick enough and we get grief from the customer.' (Wave Limited)

'Early last year there was a change in manager, which had a bit of an impact. SW did tell us at our operational meeting and gave us a heads up. It wasn't a major impact, but it caused a few delays in responses.' (Water Plus Limited)

8.7 Customer Revenue Exemptions and Allowances

This team was used by the majority of LP's (77%) in 2019 and appear to have performed well over the past 12 months, seeing improvement in their mean scores since being assessed in 2018.

Generally, whilst a relatively high volume of LPs have used this team, many use them infrequently.

One LP mentioned that this team had improved since being split last year and feels as though having two separate teams for wholesale billing works better.

Positives of Exemptions and Allowances	Improvement opportunities for Exemptions and Allowances
<p>Generally responsive.</p> <p>Good quality responses.</p> <p>Helpful.</p> <p>Direct point of contact / ease of contact.</p> <p>Generally a quick turnaround time.</p>	<p>Many LP's feel as though the burst allowances could be improved – the way allowances are calculated can appear unfair.</p> <p>Some have had to chase this team.</p> <p>One LP stated that they have had to query numerous exemptions.</p>

Positive Comments from LPs:

'We can call directly and get good responses. We feel like we've got a nice, easy avenue into speaking to them. We did a project that they helped out on which worked really well, so that was a positive message. They were really helpful and allowed us to deliver a good service to the customer.' (Wave Limited)

'We have a good relationship and have a direct point of contact. They give detailed calculations. It works better having separate teams.'(Clear Business Water / Aimeria Limited)

'Everything is great, I know the 'go to' contact (Grant). The team is more than happy for me to come and speak to them. Grant has been great; he provides me with information. We have a brilliant working relationship; mutual respect, two-way constant communication. I know they will get back to me, I've got confidence in them.' (Water Plus Limited)

'There's a quick turnaround time (Allowances). No real issues there. Quick response / fast turnaround (Exemptions). (Anonymous)

Potential improvements from LPs:

'With the burst allowance the other day, they only gave 13 days back to the customer after they had a leak for over 12 months. It was clear the customer had a leak. We had to raise a new job and start the whole process over again, I don't understand why they can't just look at the same job.' (Blue Business Water Limited)

'The Burst Allowances process could be improved slightly. I think the way they're calculated can be a bit unfair e.g. a customer's property is empty, they've had small leak, the leaks been fixed and the properties become occupied and the allowance is calculated on the usage after it's been fixed - skewed results. I think they could take it into consideration a bit more, instead of having a regimented approach.'(Anonymous)

'I don't like the process (Leak Allowance). If there's a small leak over a couple of months, this is no problem. If there's a large leak over a multiacre site over 2-3 years SW only accept 9 months of leak allowance and only 50% of that 9 months. LPs have to pay the customer back and wait 9 months to get the money back from SW.' (Commercial Water Solutions Limited)

9. Detailed Perceptions of Medium Priority Service Areas

9.1 Gap Sites and Deregistration

Frustrations with this team are still apparent, which is backed up by some of the mean scores. In 2019, Gap Sites and Deregistration saw a decrease in score for ease of interaction, making them the lowest scoring team for this element. They also scored the second lowest for satisfaction and quality of response.

However, improvement has been recognised by a couple of LPs, with one citing that they had seen benefits since the team had been split out.

There appeared to be mixed experiences around interaction with this team.

Positives of the Gap Sites and Deregistration	Improvement opportunities for Gap Sites and Deregistration
<p>Quality of response has improved.</p> <p>Response times can be mixed.</p> <p>Some LP's have monthly meetings with this team which appears to help.</p>	<p>Timeframe for response can be poor / Have to chase.</p> <p>Difficulty contacting team directly.</p> <p>Gap Sites can be slow.</p> <p>Deregistration can be difficult to deal with / don't receive updates.</p> <p>Sometimes need more information / a more detailed response.</p>

Positive Comments from LPs:

'I know who to go to. I never have fear because I know I can discuss in the monthly meeting. I have a good relationship with them and have confidence that they'll sort issues out. They're a knowledgeable team.' (Water Plus Limited)

'The vast majority of the time the services are registered no problem at all. The reports for the cases are uploaded fine. If we have a problem they come back quite quickly with detailed responses.' (Anonymous)

'The quality of responses has improved. They sometimes add a charge, but this might be miscommunication. Big improvement.' (Clear Business Water / Aimeria Limited)

'The deregistration's are straightforward and are dealt with pretty quickly and well. They seem to come back within our SLA's. We're pretty happy with that side of it (deregistration).' (Castle Water Limited)

Potential Improvements from LPs:

'There's no ability to directly contact the team easily. The gap sites work but they can be quite slow. We have to chase the team for things. They don't seem as responsive/quick as other teams. On the deregistration side of their process, you don't necessarily get updates on the cases. It's hard to find some of the policies when trying to look back. It's a bit clunky and difficult to deal with.' (Wave Limited)

'It mainly comes down to the backlog, we understand that there's a lack of resources at the moment but it's not an ideal situation. Things are being left for six months and we deal with the backlash from customers. We get a lot of customers contacting us wondering when they're going to be registered or if they've done something wrong because they're surprised by the length of time it's taking. There's only so many times where we can reassure the customer that they're making progress. Lack of resource. We appreciate the workload but sometimes we feel its excessive (timescale). We've had to chase a couple of deregistration's; it takes too long sometimes and sometimes they'll come back and say 'it's been missed.' We have to be on the ball.' (Anonymous)

'They're very quick to just do a desktop study, instead of looking at it in more detail.' (Blue Business Water Limited)

'Sometimes you have to go back and forwards, although some of the issues lie with the customer. You sometimes need more information - you have to go back to get that.' (Water Plus Limited)

9.2 Water Byelaws

Overall, the Water Byelaws team has continued to perform well in the last 12 months, with improvements recorded across all aspects.

Generally, this team was seen to have remained consistent in their service in the last 12 months by over two thirds of LPs (67%), with 22% reporting improvements in the team.

Similarly, to previous years, perhaps the one area that seems to cause polarisation in LP views is the wholesaler to end user relationship of this team. For some LPs this works well, however for other LPs where they need to follow up on queries or charges etc, the lack of communication by this team is frustrating.

Positives of Water Byelaws	Improvement opportunities for Water Byelaws
<p>Kept updated on inspections.</p> <p>Good communication for some – hands off.</p> <p>Generally felt to run smoothly.</p> <p>Some improvement has been noted around explaining / resolving issues.</p>	<p>Communication can be ambiguous – if the relationship is only with end user, they need to be clearer about any charges for failed visits etc.</p> <p>Can be difficult to contact team.</p> <p>One LP cited that they've had to go back and forth with the team.</p> <p>Explanation of work / advice can be vague.</p>

Positive Comments from LPs:

***'Generally things work smoothly, no major issue.'* (Wave Limited)**

***'They're very approachable. They notify us well in advance before they attend to a customer, they're very planned in that sense. This means that can contact our customers and give them a heads up. They work with us so that we can help the customer to resolve any issues. I've seen such a huge improvement in the past few years; they now give more explanation around what problems are and help customers resolve them.'* (Water Plus Limited)**

***'LP interaction is good. We're kept in the loop although they work with the customer directly. We're made aware of everything that takes place. The service works well'* (Clear Business Water / Aimer Limited)**

***'Quick response.'* (Anonymous)**

'They're brilliant. Water Byelaws were a pain, now they deal directly with the customer. We're still there if the customer wants to speak to us, we have all the information and

we can help them, but since they have changed the policy, we haven't dealt with one customer. That's brilliant and that's the way it should be because it's such a serious part of SW's business and should be taken seriously, they've accepted that, so they've got top marks. They've listened to what we've said in previous years.' (Castle Water Limited)

Potential Improvements from LPs:

'Reasons for failure are not explained, or how customers can rectify a problem.'
(Clear Business Water / Aimeria Limited)

'We had a difficult experience with some NHS properties recently. We've been back and forth with SW on some of their decisions, it's a bit protracting.' (Wave Limited)

There's a bit of a difficulty getting through to speak to people. They use a number of individual direct numbers, they should have a group phone number that's manned all of the time.' (Scottish Water Business Stream Limited)

9.3 Market Data

This team was introduced last year, with just under two thirds of LP's having dealt with them over the last 12 months (62%). Market Data has improved considerably since 2018, seeing the most improvement across all teams for satisfaction, quality of response and ease of interaction.

LP's seem to have had mixed experiences with this team, with some having more interaction with them than others.

Whilst the area this team deals with is recognised as being complex, key issues cited seem to surround communication.

A couple of LP's mentioned that there were numerous amendments when the team was first introduced, and it was difficult to keep up with the changes and the workload. However, these issues have now been settled.

Positives of Market Data	Improvement opportunities for Market Data
<p>Prompt responses and process.</p> <p>Knowledgeable team.</p> <p>One LP mentioned that they have monthly meetings with this team to address any issues, which seems to have helped.</p>	<p>Mixed experiences regarding ease of contact. Whilst one LP states they have a direct point of contact, this is not true for another one of the LP's.</p> <p>Sometimes there is a lack of clarification / information.</p> <p>Amendments have created more work so more-turnaround time to complete this would be helpful.</p> <p>One LP feels as though they would have benefitted from further training – Live RV etc.</p>

Positive Comments from LPs:

'They're very prompt with responses. A knowledgeable team. I have quite a lot of interaction with the team. Good quality service.' (Wave Limited)

'It was set up quite quickly. We set up calls/training with this team to help explain splits / merges and how they come about, what they need from us etc. Providing us with that information has helped us deal with the work.' (Clear Business Water Limited / Aimeria Limited)

'They're great, I know who's in charge of the team. They come back with information. If we aren't happy, I know who we can go and speak to. They will address issues. They

are quite a good team. We have monthly meetings to address any issues.' (Water Plus Limited)

'With deregistration's the SLA is 20 business days. If we come back within 2/3 days, a couple of days later we'll receive the actions.' (Anonymous)

'I've had a couple of cases recently that have been dealt with within hours which was a great help to us. Proactive premises - we're very impressed; extremely quick and extremely helpful.' (Castle Water Limited)

Potential Improvements from LPs:

'There were various changes that happened quickly, and we were expected to pick up the work. Unlike WSD, there's no direct point of contact. Some elements of it need checking more, this has created more work at our end. More turn-around time for us to do that would be beneficial. With it being a new team, there were teething issues especially with the Live RV launch. We needed more communication around this. We did get some training material but could have done with a catch up / training day / better training. We've had to ask for examples and figure things out ourselves. When we were getting customers querying, we struggled a bit. Not everything was covered and there were mistakes. We've come a long way since it was launched.' (Clear Business Water Limited / Aimeria Limited)

'The transactions we have can be quite frustrating; they stick to SLA's when they can do things quicker. They can do things within hours, but we have to wait 60 days. They could benefit from having a priority level; urgent / non-urgent cases, so urgent cases are dealt with quicker.' (Castle Water Limited)

'At the beginning of 2018 there were amendments to the data, but this is sorted now.' (Water Plus Limited)

9.4 Service Review Team (SRT)

Just over half of the survey sample have had dealings with the Service Review Team in the last 12 months (54%). Overall, this team had the fewest interaction with LPs in 2019.

The Service Review Team scores for quality of response fell in 2019. However, they do appear very easy to contact, with their mean score for this aspect seeing further improvement since last year.

Overall, perceptions of this team appeared positive, although one LP cited that due to the nature of the job, the team may be scored lower. Key issues were around quality of response and the duration of time it takes to resolve an issue.

Positives of the Service Review Team	Improvement opportunities for the Service Review Team
<p>Detailed responses and updates.</p> <p>Approachable.</p> <p>Collaborative working.</p> <p>Generally respond quickly.</p> <p>LPs kept in the loop.</p> <p>Most issues are resolved fast although some would disagree.</p>	<p>Quality of response can be poor - one LP has had to go back and forth with this team because they haven't given a full explanation.</p> <p>Long-winded process (Although perhaps this cannot be helped).</p>

Positive Comments from LPs:

'We had a really tricky customer which was an ongoing dispute. This team were really good at keeping us informed, sending us extra information and helping us communicate with the customer. They worked really well with us. By working together, we got the matter resolved.' (Blue Business Water Limited)

'On the whole, they usually come back very quickly. Most issues are resolved fast. We receive regular updates. If things are being drawn out and we need to speak to the contractors, I get included in those conversations or get an update, so it's not left in the dark.' (Anonymous)

'They come back with such detailed updates and always keep us in the loop. If we are expecting an update and we don't receive one the team will always tell us why and when they aim to get an update sent to us.' (Clear Business Water Limited / Aimera Limited)

'I've got such a great relationship with this team. I'm on the phone to them every day / email them direct, they're very approachable.' (Water Plus Limited)

Potential Improvements from LPs:

'Not much fault. When a complaint is confirmed to be SW's fault, it's passed to specific departments to deal with, which perhaps makes it take longer to resolve and get a response. Almost because of the nature of the team it gets a lower score. Complaints should be rectified when they first come into light, they have to go through various departments - long winded. This team is a bit stuck in the middle of it.' (Clear Business Water Limited / Aimera Limited)

'It comes back to the quality of response, we've had a few complaints where we've had to go back multiple times because we don't understand the response, or it hasn't fully answered the customers query. We could save time by having one full explanation. They're not addressing all of the customers issues. If we've highlighted multiple issues, maybe 6 out of 7 will be addressed but one will be brushed over. We need more of an explanation to go back to the customer with a full response.'
(Anonymous)

'The time it takes them to resolve things – the process can be slow; consists of sending a form or request to the portal, a series of questions and expecting a full in-depth response. Some of the information can be gathered from SW, some from Clancy Docwra etc. There are different areas where they might need to draw the information from. They might need to wait on facts.' (Castle Water Limited)

10. Online Service Satisfaction

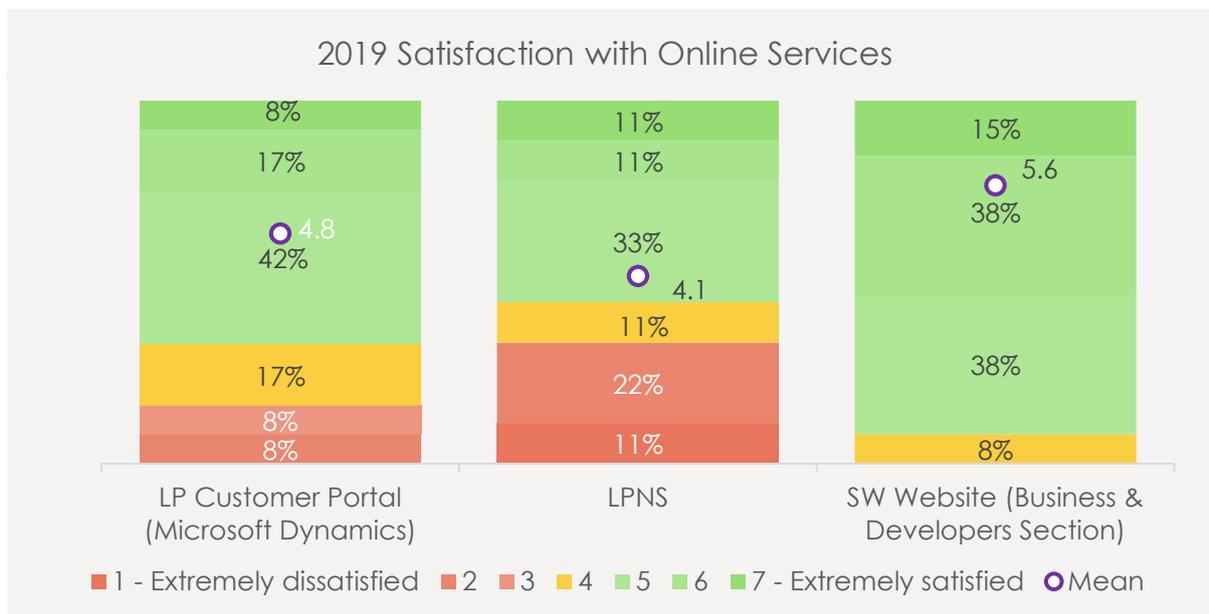
As in the previous surveys, satisfaction with online services was also explored, to gauge LPs views of the varying Scottish Water support portals available.

There were some changes to the online portals in 2019. The Ascend Portal was renamed as the Licensed Provider Customer Portal (Microsoft Dynamics). The LP Portal was also renamed in 2019 and is now known as the Scottish Water Website (Business & Developers Section).

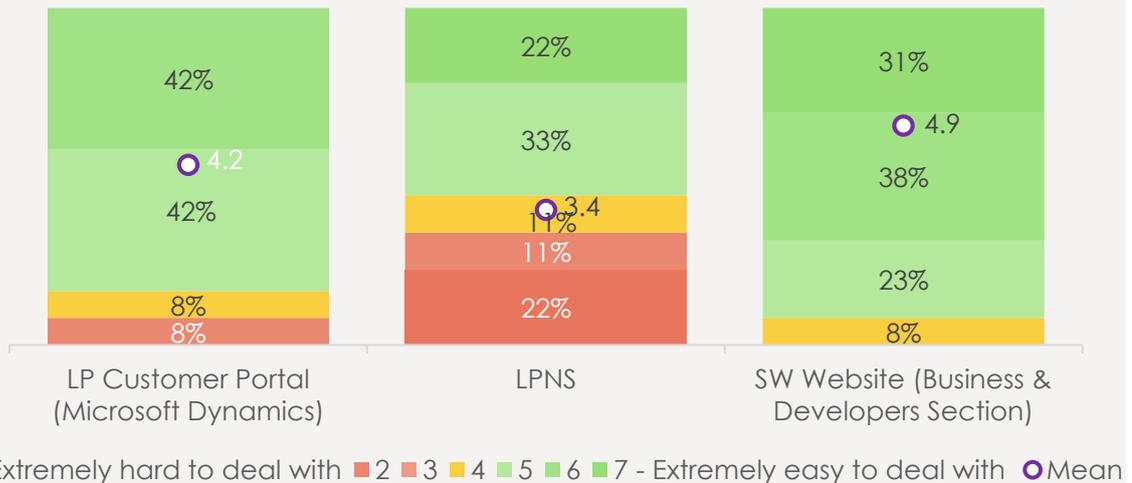
In 2019, 100% of LPs had accessed at least one or more of the portals in the last 12 months. 92% (12) had used the LP Customer Portal (Microsoft Dynamics), 69% (9) the LPNS and all (13) of the LPs had used the SW Website (Business & Developers Section).

As we have seen previously, satisfaction varies depending upon experiences and how critical individual LPs view the need to access these portals. However, the small sub samples should be kept in mind.

The mean satisfaction score for the LPNS has fallen slightly since 2018, with the ease of interaction, falling considerably by -1.5. Both the LP Customer Portal (previously Ascend) and the SW Business & Developers Section (previously LP Portal) scored well for satisfaction, with The Business & Developers Section seeing slight improvement. However, both teams experienced a decrease in mean score for ease of interaction, with the LP Customer Portal falling notably from 5.5 to 4.2 in 2019.



2019 Ease of Interaction with Online Services

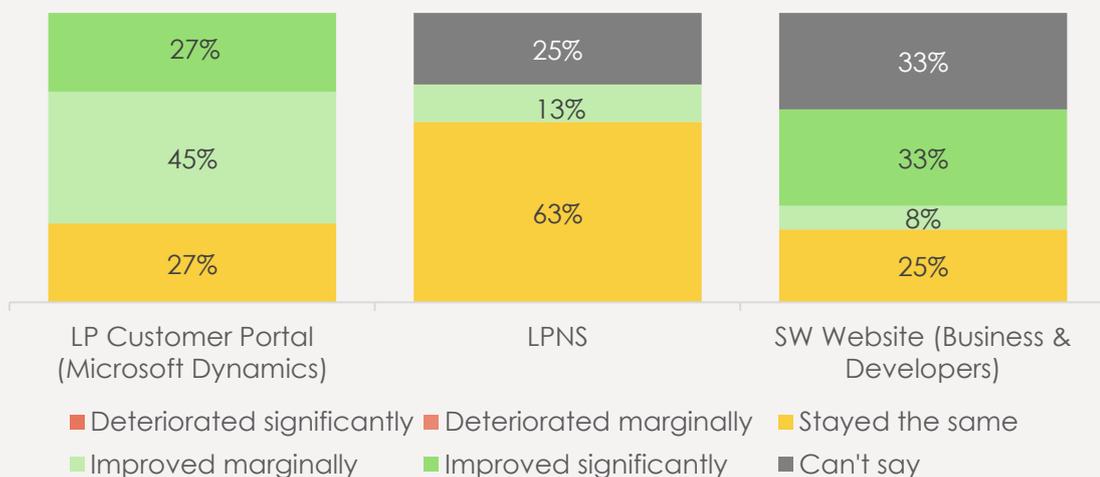


Development and the impact of the License Provider Customer Portal (Microsoft Dynamics) and Scottish Water Website (Business & Developers Section) are reflected in the improvements noted in the below chart, with both portals reported as having undergone significant improvement by a few LPs in the last 12 months. Just under three quarters of the LPs (73%) recognised some improvement in the LP Customer Portal.

Not surprisingly, the LPNS is largely viewed as having remained the same as previous years (63%), with one LP noticing slight improvements.

Overall in 2019, LPs generally had a positive perception of the LP Customer Portal (Microsoft Dynamics) and SW Website (Business & Developers Section). The development of these online services seems to have been widely recognised by LPs, with many reporting improvements. As in previous years there were still a few groans from LPs around the LPNS, with little to no improvement being noted. However, this year, it seems perhaps there is less frustration here, due to the development of the other online services, which appear to have had a positive impact on the LPs.

2019 Level of Improvement in last 12 months



11.1 Licensed Provider Customer Portal (Microsoft Dynamics)

Positive comments from LPs:

'It's really easy to use, straightforward, intuitive and looks fairly modern. Overall quite pleased with it.' (Anonymous)

'Being able to go straight onto the portal and raise forms there and then and things populate for you instead of having to do excel forms. The filters you can use on there. You can run reports from it. The options you can use on the portal are really good. Really good for us to have it all under one roof. It goes to one place and gets distributed to teams. We receive updates by email which is good. Any important documentation can be put onto the portal, so we can check previous customer history. It's accessible and prevents us from causing extra work for ourselves.' (Clear Business Water Limited / Aimeria Limited)

'It's an improvement on the previous methods that we had to use. Its adequate, it certainly could be improved upon. All the information is there. It's easy to use, that's what we like about it. Easy to get set up and get going.' (Anonymous)

'The portal is just getting better; they're putting a lot into it. Compared to what it was like when we first started using it to what it's like now, you can see that it's getting better, it had slight teething problems. The portals great, it's really really good. Self-explanatory.' (Water Plus Limited)

Potential improvements from LPs:

'It needs a big rethink. It's an archaic like system. It needs a general search button, you have to be very specific. I have emailed to say I can't find something and been told to fill out a form. It's hard to find where the right things are. Really tricky to use. You can't just put in the SPID and find what you're looking for. Even with a reference number it's really tricky to find a case.' (Blue Business Water Limited)

'It would be good to have auto population like other retailers; it saves having to copy and paste lots of information.' (Anonymous)

'There are limitations on how many email addresses responses can go to, which has caused some issues. It was designed around how SW perceived retailers would want to receive responses, without checking with retailers.' (Scottish Water Business Stream Limited)

'Bit clunky. Could be better with regards to the clunkiness of it; it's quite slow / not user friendly. Some things don't work correctly but you can get past it all. It's not always clear what heading the information would come under, there's no search system to find what you're looking for, you have to keep on pressing links until you find the right one.' (Commercial Water Solutions Limited)

11.2 LPNS

Positive comments from LPs:

'It's a little old fashioned. Difficult to search. You have to go through a lot of different pages. It doesn't work so well, but it is functional and does do the job. It allows us to see if there is anything affecting our customers.' (Anonymous)

'Any information I need I can go on there and find it, no issue on it. I don't use it as much as I should use it; about twice a week.' (Water Plus Limited)

Potential improvements from LPs:

'More modern and easier to search. Increased search function.' (Anonymous)

'Antiquated and really not fit for purpose. Fed this back last year, still no improvement. They have developed a much better tool but haven't launched it yet. The current one is quite time consuming on our side, keen to get the new version up and running. Expect to have it up and running by now. They have managed expectations and explained that they have a few bugs that they need to iron out before launching, but we had to ask first. They're not as proactive as they could be.' (Wave Limited)

'I'm not a massive fan of it. It was in the process of being merged with the portal, but I don't think it went to plan. It's sluggish / slow. I think the original idea behind it was fantastic; LP's being able to see all of the problems affecting their customers.' (Anonymous)

'There's no tick box for SW to comply with the regulations. It's not a very user-friendly system, not very practical to use. It hasn't changed in 10 years. They're looking to introduce a new system but it's not yet available. I would like to see proactive communications, specific to our own customers. The messages are quite generic (postcode regions) and don't identify individual customers, we can't easily identify which of our customers will be impacted. We are expecting a new system imminently, there's been some delays on that coming out, but that should resolve issues.' (Scottish Water Business Stream Limited)

11.3 Scottish Water Website (Business & Developers Section)

Positive comments from LPs:

'We use that for every document we need. The old website was hard to navigate. It's got a new look / new feel. Everything is under a different category. The new version looks nice and feels nice, it's easy to get through and find what you're looking for. Big improvement; updated, fresh.' (Clear Business Water Limited / Aimeria Limited)

'It's definitely an improvement. The old version was too cluttered, it was difficult to find things. It's a lot easier to find things on the new version. It looks great, it's in line

with the portal design. It's got room for expansion so it should be easy to update. It's a good way to link customers directly to the original article.' (Anonymous)

'It's quite good. It has been revamped; more modern and user friendly. We can share it with customers, it's easy to share and take them through it. Apparent where you need to be on website - straightforward.' (Anonymous)

'There's a lot of data on it. The people who populate the data are clearly very knowledgeable about it.' (Commercial Water Solutions Limited)

Potential Improvements from LPs:

'People who are using portal may not be as knowledgeable as those who populated the data. Trying to find information is difficult. It should have search function on it to make it easier to find what you're looking for.' (Commercial Water Solutions Limited)

'I have found a lot of broken links. I've seen some grammar typos. Customers can access a lot of the LP documents; I was a bit on the fence on whether that was a great idea. I can understand the rationale behind it, but I don't think customers need to see some of the documents and it may confuse them; it leads to more questions.' (Anonymous)

'There's no general search function.' (Blue Business Water Limited)

11. Conclusions and Recommendations

In 2019, LPs were on the whole very complimentary regarding Scottish Water. There is continued recognition that they are trying to improve their service and work collaboratively with the LPs.

Encouragingly, many of the teams (9 of the 11) have increased their mean scores across the various metrics since 2018.

NPS witnessed a dramatic improvement and showed +50% indicating that the improvements experienced are translating through. Equally, the personal effort score remained relatively consistent with half of LPs (50%) giving a low score of 1 or 2. None of the LPs gave a high score here this year.

The Licensed Provider Customer Portal, which is now fully functioning, seems to be making life much easier for LPs and thus is contributing to the improvement in the scores.

The Development Operations team (previously Retail Connections team) had seen some improvement across all metrics, which is encouraging, although they are still one of the lower performing teams. Most criticism seemed to be around the clarity of process and timescales involved. Equally, LPs often mention they have to chase this team.

Gap Sites and Deregistration team also saw some minor improvements in scores this year, however, again they are still one of the lower performing teams. Most negativity is derived from a lack of updates, chasing and detail of responses.

The lowest performing team last year, Market Data, encouragingly saw the greatest improvement in 2019.

The top three teams in 2019 consistently scoring higher than average satisfaction scores for service, quality of responses and ease of interaction, were the Account Management, Service Review and Trade Effluent teams.

In terms of the online elements, there is a general feeling of positivity and improvement. The halo effect of the LP Customer Portal and Scottish Water Website (Business & Developers Section) continued to positively affect LPNS perceptions.

Once again, most LPs recognise the improvements made by Scottish Water over the last year. Where teams perform well, it is due to the perceived good communication, regular and timely updates provided, an escalation process in place if needed, and the quality of information provided that seems to award them praise. Equally, if they are the portal, it makes life much easier for LPs.

The key focus for improvement should continue to be on Gap Sites and Deregistration and Development Operations. Both have relatively high level of LP interaction and continue to be underperforming, albeit improvements have been witnessed in the last 12 months.

Key issues that exist are not dissimilar to previous years:

- **Customer Revenues – Gap Sites and Registration Team:** although improving, there is still a need to continue this and deliver consistent experiences in response times, provision of updates and more detailed responses occasionally.
- **Development Operations:** Being on the portal would help LPs here. Communication is still a key issue for this team and the lack of updates is extremely frustrating and costly for LPs. A 'guide to' that LPs could provide customers with would help – outlining the process, what is required and associated timelines – may speed process up. There appears to be a lack of clarity around what is required.