



## **KVI Review Update CoMC**

19<sup>th</sup> February 2020

# Background

- Agreed at CoMC on 15 January 2020 that the revised KVIs would be an interim solution until new operational performance measures were agreed and implemented.
- There is a project underway within Xoserve to develop new operational performance measures.
- It was suggested that the revised 'interim' KVIs would include some of the existing KVIs as well as customers' 'Top [x]' issues.

# Proposed Consolidated KVIs

- Existing KVI measures:
  - Financial Reporting
  - Customer Data Security
  - Customer Relationship Management
  - Change Management
- Proposed Top [x] Issues:
  - Issue Resolution
  - Communication
  - Compliance
  - Any others?

# Strawman KVI – Issue Resolution

- Problem Statement:
  - Resolution of issues can be slow, the updates provided do not give sufficient information to enable customers to understand the materiality of the issue and the actions that organisations needs to take as a result of the issue.
- Commitment:
  - Use MI to drive greater insight
  - Score each issue based on customer impact (see following 3 slides) and manage each issue accordingly
  - Notify customer as soon as issue is realised [depending on issue score]
  - Follow up with a plan for rectification (to include tasks, timescales, ownership)
  - Provide sufficient information in a timely manner, to enable customers to make an informed decision regarding actions they need to take.
- Measurement:
  - [is this something CoMC are prepared to measure?]

# Customer Issue Prioritisation Framework

Driver		Category 1 (5 points)	Category 2 (4 points)	Category 3 (3 points)	Category 4 (2 points)	Category 5 (1 point)	Total
Customers affected		All customer segments	An entire customer segment	Multiple customers, 1 segment	1 customer	Xoserve only – No external customer affected	/5
Processes affected		<ol style="list-style-type: none"> <li>SPA - Transfer of ownership/ Registration</li> <li>SPA - Confirmation, Objections, Referrals, Withdrawal</li> <li>Gemini processes (Gas Noms, Allocations, Energy Balancing)</li> </ol>	<ol style="list-style-type: none"> <li>INV - Invoicing: Capacity, Commodity, Reconciliation, Gemini invoices</li> <li>INV - Invoicing - other invoices</li> </ol>	<ol style="list-style-type: none"> <li>Read Processing</li> <li>SPA - Supply Meter Point updates</li> <li>AQ process</li> <li>OTHER - Apply and Remove sanctions</li> <li>OTHER - Portal Updates</li> <li>RGMA - Asset Updates</li> <li>OTHER - BW Reporting, Updates from CMS, Portfolio Reporting, Data Enquiry</li> </ol>			/5
Impact	Cost to customer	Substantial	High	Moderate-High	Moderate	Negligible	/5
	Reputation	Significant national media/gov coverage; Total loss of confidence from regulator; Severe or persistent regulatory breach; Major business critical services ceased for >1 day; Unable to meet multiple strategic objectives	Intervention by regulator, serious breach of legal or contractual obligation; Prolonged business critical services outage, RTOs not met; Severe impact on success of a strategic objective	Censure by regulator, breach of legal/ contract obligation; Business critical services lost but RTO met; Impact on >1 business unit objectives. Some impact on group strategic objectives; 50% rise in complaints	Failure to meet external SLAs / standards; Some impact on operations; Short term impact on business critical service; Impact on one business unit objective; 25% rise in complaints	Failure to meet internal standards; No impact on operations; Minor impact on some processes; Impact on team objectives only; Isolated complaints.	
	Customer Impact	Substantial	High	Moderate-High	Moderate	Negligible	
Time to Resolve		>6 months	1-6 months	>1 month	>1 week	>1 day	/5

# Defining priority of each Customer Issue

Providing a tiered level of service both in terms of customer communications and issue resolution SLAs, utilises current capability/capacity most effectively to meet customer service KVIs, and sets a default standard for customers so that Xoserve can better manage their expectations.

In the first instance, this categorisation should be applied to new customer issues in order to determine how effort is spent to resolve them. Existing incidents and defects should then be reassessed using the same framework in order to;

1. Identify any customer issues that require a change in priority; and
2. Gain a better understanding of the current cost (financial or otherwise) of outstanding customer issues



# Customer Issue Communication & Resolution

Each level of Customer Issue support should be attributed with specific targets around issue resolution and further communication/support.

The following details the expectations around tiered Customer Issue communications.

Customer Issue Management processes – Defect Resolution					
Service Level	Resolution time	Response Time	Associated Defect Priority Level	Communication Method	Communication Timings
Bronze	TBC	TBC	D5	Website	As required
Silver	TBC	TBC	D3-D4	Email & Website	Weekly
Gold	TBC	TBC	D1-D2	Email & Website	Daily

# Strawman KVI - Communication

- Problem Statement
  - Communication from Xoserve lacks clarity. It is not always clear who a message has been sent to; why it has been sent; or what actions are required by the customer.
- Commitment
  - Maintaining distribution lists & notifying customers who the communication has been sent to in the comms
  - Standard template used (where appropriate) which clearly states what the comms is about, what action is being taken and if the customer is required to do anything and the material/financial impact on customers & who impacted
  - Comms to specify what we know & what we don't know and when we will provide further information
  - Contact name will be provided if further is required from the customer
- Measure
  - [is this something CoMC are prepared to measure?]



# Strawman KVI - Compliance

- Problem Statement
  - Customers do not have confidence that they are compliant with their obligations in relation to services that Xoserve provide on their behalf.
- Commitment
  - Report to CoMC any indications of a compliance failure
  - Produce action plan for approval at CoMC that will list actions for resolution and mitigation of any further failure.
- Measure
  - [All actions complete within approved timescales]

# KVI Review Plan

Activity	Owner	Start Date	End Date	Status
Present approach & plan to CoMC	Xoserve	16/10/2019	16/10/2019	Complete
Review KVIs and measures	Xoserve	17/10/2109	31/01/2020	Ongoing
Carry out sessions to discuss KVIs with customers (via constituent groups)	Xoserve	17/10/2019	28/02/2020	Ongoing
Develop strawman KVIs and measures	Xoserve	04/11/2019	15/01/2020	Complete
Provide progress update & share view of proposed KVIs November CoMC	Xoserve	20/11/2019	20/11/2019	Complete
Review strawman KVIs at December CoMC	CoMC	18/12/2019	18/12/2019	Complete
Provide feedback on strawman KVIs	CMs	19/12/2019	03/01/2020	Complete
First formal review of the draft KVIs and measures at January CoMC	CoMC	15/01/2020	15/01/2020	Complete
Redraft of the KVIs and measures at February CoMC	CoMC	19/02/2020	19/02/2020	On target
Provide any comments to Xoserve on the draft KVIs	CMs	20/02/2020	06/03/2020	On target
Final review & approval of KVIs at March CoMC	CoMC	18/03/2020	18/03/2020	On target
New KVIs effective & published	Xoserve	01/04/2020	01/04/2020	On target

# Agree Next Steps

- Views on the proposals?
- How would you like to proceed?
- Would like to gain approval of a set of 'KVI's' at March CoMC meeting.
- Agree measures for 'Top x' Issues & how this will work

# Customer Relationship Management

- Title
  - Customer Relationship Management
- Desired Outcome
  - Improve the quality and efficiency of Xoserve's engagement with customers
  - Improve Xoserve's relationship with its customers
  - Adding value to customers
- Measure
  - Target: 95% or more of customers who provided feedback stated that they 'Trust' or 'Starting to Trust' Xoserve when requested to rate as 'Trust', 'Starting to Trust' 'Starting to Distrust' or 'Don't Trust' with
    - strategic decisions
    - with delivery of operational services
    - putting our customers first
  - Measure calculated from feedback received for the previous 3 months (reported quarterly)
  - Feedback provided is evaluated and actions plans developed to improve pain points for customers

# Change Management

- Title
  - Change Management
- Desired Outcome
  - Customers are involved and consulted regarding solution development
  - Customers have been provided with information and support to ensure they are prepared and ready for the changes being implemented
  - Changes delivered as per the agreed plan (at the relevant governance committee)
  - Delivering the customer benefit
- Measure
  - Target: 90% or more of customers who provided feedback responded 'Always' or 'Usually' when requested to rate the service as: 'Always', 'Usually', 'Rarely' or 'Never'.
  - Measure calculated from feedback received based on the change management activities over a 3 month period (reported quarterly)
  - Feedback provided by customers is followed up to understand context, evaluated and continuous improvement plans developed and monitored until resolved

# Customer Data Security

- Title
  - Customer Data Security
- Desired Outcome
  - Protecting the integrity and security of customers data at all times
  - Zero data breaches
- Measure
  - No data security breaches categorised as ‘Critical’ or ‘High’
  - No more than one (1) data security breaches categorised as ‘Medium’
  - No more than five (5) data security breaches categorised as ‘Low’
  - Measure calculated based on security breaches during a calendar month

# Financial Reporting

- Title
  - Financial Reporting for the current financial year
- Desired Outcome
  - To provide customers with a view of company financial information
- Measure
  - Financial reporting provided to Contract Management Committee to agreed timescales
  - Measure based on financial reporting provided quarterly
- Xoserve's Commitment
  - Quarterly updates including actual performance, against budget / latest forecast, any changes to forecast-and the potential impact on charges.
  - Offer sessions to review finances at an individual customer charging level
  - Preliminary Year End financial reporting provided in May