Interim Key Value Indicator (KVI) Scorecard – November 2020

KVI	Commitment	Monthly RAG
Relationship Management	- Improve the quality and efficiency of Xoserve's engagement with customers - Improve Xoserve's relationship with its customers - Add value to customers - Feedback provided is evaluated and action plans developed to improve pain points for customers	**Last update:-** Target Score: 95% Latest survey scores: Overall Trust Score 90.91% (up from 85.2%), Strategic Decisions 93.94% (up from 86.6%), Operational Services 87.88% (up from 77%) and Customer First 90.91% (down from 95.1%) **Drivers of improved scores:** Improvements to customer engagement (proactive engagement approach to identifying customer pain points, understanding customer needs and visibility of AQ taskforce progress) and improvements to customer contact response timescales. Sustained improvements to operational service levels and customer engagements during COVID19 has seen the customer Trust score strengthen. **Next update:-** Jan'21 following Dec'20 survey
Change Management	- Involve and consult customers regarding solution development - Provide customers 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	**Last update:-** 8 Customers responded to the change survey from across all customer constituencies. The score for the October Survey was 100% with current year to date score also of 98% We received feedback on process improvements including the website Release pages and change development. We continue to work closely with all customers to understand the context of the feedback and discuss measures to ensure that their future interactions with Xoserve for change are positive. **Next update:-** February 21 following the January survey
Customer Data Security	- To protect the integrity and security of customers data at all times - Zero data breaches - Notify customers immediately in the event of a data breach that is categorised as [Critical or High]. - Report monthly to customers in the event of a data breach that is categorised as [Medium or Low].	There were 3 low breaches only.

Financial Reporting	- Minimum of four updates per financial year including:-
	  - preliminary results from the previous financial year
	  - quarterly forecasts which include actual results key themes, investment progress and (where relevant) impacts on charges position
	- Offer sessions to review finances at an individual customer charging level.
		Initial update on Q2 forecast position delivered to November CoMC, follow up on final Q2 position to December CoMC

Customer Issue Resolution	- 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.	Although MPRN data is shared for AQ defects earlier than previously the data set does not contain all required information for customers. This is being picked up as part of the process improvement work for the AQ Taskforce. Assurance reporting and MI produced which is being used to identify AQ issues earlier. The defects being raised now are 90% identified by us and not our customers. The number of MPRNs within those defects is low. The age profile of AQ defects is decreasing with a targeted focus on those high priority customer impacting ones now dealt with. All new issues identified during November have been scored using the Issue Management Framework. Communications issued as per framework . All issues have been recorded on the published Issue Register. Included all issues where a comms has been sent during November Communications issued relating to financial adjustments as a result of AQ defects 2nd & 3rd December including data used to calculate the adjustments for the last set of MPRNs. On target to complete adjustments for historical adjustments by end of 2020.
Communication	- 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	The overall score for the customer communications issued in November was 9.7/10, which we are classifying as 'Exceeded Expectations'. This is a 1.4 increase in comparison to last month. Our average monthly KVI score to date is 8.1/10 - 'Met Expectations'. Next month we shall concentrate on content of the comms now we have consistency in format and basic requirements required in a communication.