

Customer Challenge Group Vulnerability sub group

Meeting #2, Paper #4

Vulnerability Work Plan Update

30 August 2017



Strategy Framework



Knowing our customers

- Define Customer group
- Identifying customer group
- Understand Customer Journeys

Knowing what our customers want

- Engagement
- Existing approaches
- Use what others know
- Use of data

Delivering for our customers

- Services
- Processes
- Training
- Systems

Developing for our customers

- Continuing research
- Joint working groups
- Industry groups
- Horizon scanning



Action update – Knowing Our Customers

Water UK – Vulnerability Group

- Water UK workshops have been held throughout the year exploring how utilities can work together on customer vulnerability, building on Energy
- Outputs were gathered were summarised into overall themes :
 - Common industry needs codes and outputs
 - Implement two-way data sharing
 - Informed consent
 - Referrals and signposting
 - PSR awareness and joint initiatives
- Next workshop in the Autumn will agree priorities and timelines.
- A working group will continue working with energy to continue consistency.



Action update - Knowing Our Customers

Data Collection

- Further data is required to determine how many customers in our area are potentially vulnerable.
- An Experian extract will produce a lot of the data, which is underway
- Other public data sources also being accessed, including:
 - Office of National Statistics website and
 - Local Authority Websites
 - e.g. KCC: 8% of the Kent population claim a disability benefit and
 - 17.6% have a health problem that limits their day-to-day activities.



Action update – Know what our customers want

Priority Services Register

- Western Power has been visited
- Methodology documentation shared with us.
- WPD is recognised nationwide for its practices and inclusion of vulnerable customers
- We are therefore using this information to align ourselves with the energy sector.
- We have taken WPD's PSR categories and matched to ours.
- Gaps have been identified which we have developed workarounds –some IT changes will be required to incorporate longer term in our CRM



Action update – Delivering for our Customers

BS 18477 accreditation

- BS standard has been reviewed and a gap analysis has been carried out in-house.
- Provisional date booked for initial meeting on 31st August.
- Our training documentation has been reviewed with the first phase due for completion 10th August and the second phase 25th August.
- Work will continue on the gap analysis until BSI meeting, following which action plan for accreditation will be assessed & developed.



Engaging with our customers

- Engagement approach being developed
- Linked to CCG engagement sub group
- Will build upon well-established direct contact and field engagement through Customer Care Team
- Input from CCG VSG
- Will continue to develop knowledge and expertise of support and referral groups e.g. RICA event, 6 July.



Next Steps

- Detailed project plan and timing for development of Vulnerability Strategy
 - Utilise approaches developed in other sectors
 - Agree scope, outputs and timescales
 - Data gathering and assessment
 - Referral group mapping
- Develop and deliver Vulnerability Strategy engagement plan



Appendix 1: Defining Vulnerability

Defining Vulnerability

Individual

SEW

Question:

1. What are the key customer journeys?
2. What are the key risk factors for each scenario?

e.g.

Understand Bill

Afford Bill

Access Information

Be more water efficient

Safety, e.g. resilience

e.g.

- Service
- Support
- Communications
- Systems
- Engagement

e.g.

- Next generation text relay
- Text options
- Braille / sign video
- Inclusive website
- Easy read communications
- Video explanations
- Community outreach

Risk Factors

e.g.

- Cognitive
- Visual
- Hearing / Sound
- Mobility
- Dexterity

e.g.

- Internet access
- Lone parent
- Tenant
- Bereavement
- Relationship Breakdown
- Carer
- Leaving care
- Low income
- Casual worker

e.g.

- Rights
- Support
- How to use technology
- Language

Question:

3. What does SEW know about the characteristics / circumstances of its customers

Situation / Scenario

Source:
Ofgem Consumer Vulnerability Strategy Progress Report

Appendix 2: Identifying Vulnerability

Identifying Vulnerability

Self-referral

- Customers self identify as having additional needs
- Carers refer family members, friends and people onto the PSR

How do you promote the PSR and extra help?
How do you make it easy for customers to sign up?
Through which channels can customers sign up e.g. online, is it on the back of bills?

Third party referrals

The Company has arrangements in place so that third parties can refer customers onto their social support. These are comprehensive and strategic to ensure all types of additional needs are identified. Networks are two-way
These are likely to include:

- National and local charities
- Housing associations
- Job centres
- Social workers
- NHS – doctors, nurses and support workers
- Debt charities

What referral pathways does the Company have and what is their impact?
How has the company sought to maximise its referral pathways?
How has the company identified the best partners to work with?

SEW identifies vulnerability

Call centre and field staff are proactive in using all touch points with customers to identify and keep up to date customers records about additional needs.

- **Ongoing training** for call centre and field staff on identifying vulnerability
- **Mechanisms** in place to record and capture vulnerability e.g. internal IT systems; field staff have an app to record vulnerability.
- Phone systems can automatically identify key vulnerability phrases and fast track customers to the customer care team.

How do you train staff and ensure training and knowledge is kept up to date? How do you identify gaps in training/understanding?
What mechanisms do you have in place for field staff/call centre staff to record vulnerability/access information about vulnerability?

Joint working

The company :

- Is proactive in working with other companies and sharing data with other utilities e.g. SSEN, UKPN, Southern with customers consent.
- Has aligned their PSR codes with other utilities to enable sharing of data.
- Is participating in and facilitating 'tell me once' approaches e.g. by Citizens Advice and private companies

What are *you* doing to promote and enable data sharing?

Intelligent data use

The Company has:

- Identified the key customer water journeys and mapped vulnerability risk factors
- Used publically available data to map vulnerability/additional needs in its area
- Mechanisms in place to keep data on additional needs up to date – this is critical
- Uses the data strategically e.g. engages with those on the PSR to identify satisfaction levels/uses data to inform resilience decisions.
- Has an iterative approach so that improvements continue to be made.
- Uses data to identify trends/future consumer issues in vulnerability which will impact their business.

Which of the above are you doing?