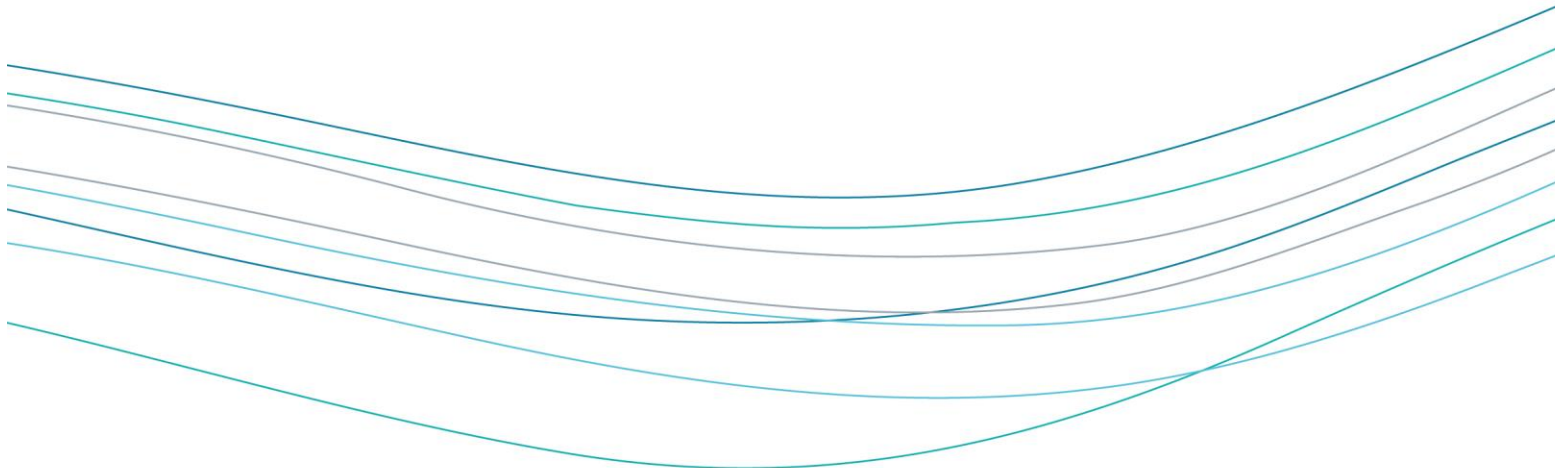


Operational Advisory Group (OAG)

Minutes from 27 August 2020 meeting



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Attendees

OAG Members and Guests

- ◆ Sam Dawson (SD) WHL
- ◆ Ashley Connors (AC) WHL
- ◆ Sarah Harrison (SH) RTL
- ◆ Madeleine Moores (MM) RTL
- ◆ Paul Baker (PB) RTL
- ◆ David Seymour (DS) WHL
- ◆ David Moss (DM) RTL
- ◆ Patricia Quintana (PQ) WHL
- ◆ Frances Lickley (FL) RTL

MOSL

- ◆ Chris Dawson (CD)
- ◆ Evan Joannette (EJ)
- ◆ George Kelly (GK)

Agenda

- ◆ Review feedback and suggestions from Wessex Water on C1 process
- ◆ AOB

Meeting notes

1. Feedback from Wessex Water

Ability to have flexible rejection/deferrals for wholesalers? Current flow = lack of flexibility/distinct steps at which you can reject/defer

- Current flow is setting standard of how rejections/deferrals should be done in the Market (requests HAVE been closed without Retailer knowledge/input, so have to restart the whole process) - it is felt that Retailer needs more input over these?
- Want to standardise where referrals/rejections occur in the process - no improvement if Wholesalers are just having the ability to defer or reject any time, (which is no change to status quo). Need level playing field; we have Wholesalers who reject lots and some who don't.

OAG comments

- EJ - are the right places for these 'flexible' rejections/deferrals already built into the process flow? CD - hope the OAG agree that these are already built in.
- PB - agrees with CD assessment. Makes sense to have it as a structured part of process flow.
- PQ - how SLAs will be incorporated? Elongating task, so where does SLA for the Wholesaler start now? - CD; system will be flexible from this point; SLA will start on the 1st day, and finish when Wholesaler does initial site visit. The request will stay open if it loops and there will still be a requirement for the Wholesaler to complete that request, but the SLA (C1a) has been completed. Could create multiple C1As against a request if it loops around?
- FL; Don't want multiple cases to track - want it to go back round in a loop and have it as case management tool (i.e. 1 SLA at a time, multiple SLAs for multiple C1s might be difficult to manage - EJ).
- PQ - want consistency in SLAs across all processes (e.g. does this 'idea' work across all processes?) --> yes (CD) // EJ = *might* need to go back and review C1 at a later stage but perhaps not. We are only reviewing one process at a time so things which work for C1 might not work for the next...
- DM - maybe have both based on which data items are agreed on by both TPs to have been finished and signed off, and which aren't? -> EJ; these things can be hard to build (might be 'nice to have').

CONCLUSION: Majority OAG opinion is that controlled rejection data points programmed in is preferred over deferral/rejection at any stage in the process;

Ability to request info at any time pauses SLA which would give ability for TPs to converse outside process flow.

OAG comments;

- DM - no need if there will be a chat facility between case managers.
- PQ - pausing definitely a requirement (e.g. could be waiting for customer to get back to you for a number of days/weeks which affects SLA compliance)
 - CD currently as it stands, 'request for info' point in the process flow pauses the SLA, we want to know if we want to pause at any time. PQ believes this is the best way forward.

- EJ - might be better to ensure that all of the information which the case manager needs is conveyed to the provider on Day 1 to prevent drip feeding of information. Might not need to keep requesting info and pausing then?
- PQ; pausing as a result of 'requesting information' and starting a communication link could be misused by TPs/sometimes you may not want to pause, just want some more information?
- DS; build with key points - how many delays at key points?
 - EJ; measure this as time goes on - do these just close after 'X' amount of times?
- SD - facility to pause a process at any point is important (e.g. TE can become complex, as well as C1s) - maybe pause 'at any point' as long as both parties agree on it?
 - CD; coding could be hard?

💧 **CONCLUSION: could simplify process flow if ability to put 'any time deferral' following query for more information**

💧 **Pausing SLA with no customer contact at initial (first/second) attempt, at a point in time?**

- Allows Wholesaler to better adhere to SLAs - Wholesalers already do well at adhering to these SLAs, but losing valuable time to schedule visits.
- The process flow does allow for these scenarios.

💧 **OAG Comments**

- DS; where you have had contact with a customer more than once, you ought to be able to pause.
 - CD; there is already a deferral option (after 2-3 calls) - what this suggests is after the initial 1-2 calls to be able to pause the SLA.
- DS - where we have contacting more than once = we want to be able to pause so that the Retailer can do some 'digging' and provide some information
- CD - even in the first call, you are able to pause. If you have deferral after attempt 1 = elongation of customer journey?
- PQ - could consider maximum of 'X' days pause (e.g. 3 days) otherwise you have 'reached SLA'?
- FL; to have separate SLAs based on customer contact type?
 - EJ might be complex but it is possible.

💧 **CONCLUSION: Something for MOSL to take away and think about for code design. If no customer contact made, a limited number of days to pause SLA. Need to rule out misuse and delay of customer journey. **ACTION 1****

💧 **Having 'timeout' for retailer to gather more information?**

- What's a good timeout timescale?
 - FL - depends on level of complexity? e.g. email has shorter timeout?
 - EJ - want healthy pressure on TPs to answer queries stuck in a limbo state.
 - PQ - down to Retailer; if they want good performance they would get back instantly.
 - FL - put in option 'customer can do that but it will take a couple of weeks'?
 - PQ - Retailer could respond within time, but request the case gets paused due to 'x/y/z'

- CD - may need something to allow the Wholesaler to pause for longer if needed, perhaps in partnership with retailer

💧 **CONCLUSION: OAG agrees on the idea of time-limited timeouts - prevents cases being stuck in state of limbo. ACTION 2**

💧 **What are the Business rules for repeating OPS start and end steps?**

- Currently C1A SLA would happen once - do we want to repeat/have multiple C1As (SLAs) to the request, or just one but the request stays open - e.g. to be resolved?
 - DS; maybe not C1A but another SLA?
 - CD; if Retailer feels has not been fulfilled - does request stay open? -->
 - PQ; SLA finished when site visit is completed?
 - CD; Retailer can still dispute outcome though.
 - EJ; This is a difficult performance measure? - special reporting to determine which TPs have C1As running in the loop multiple times.
 - DS; if you are doing a C1A, this is the process you are following. if the Retailer has another question on the back of this, it is another request? unsure on what circumstance you would go back round the loop --> scenario, where Wholesaler hasn't responded to request in full --> Retailer would just reject solution

💧 **CONCLUSION: OAG doesn't feel that multiple SLAs (C1As) are the way to go and that it would make it more complicated.**

💧 **OPS end step if already counted at end of the month**

- When OPS is already reported, but is reported at the start of the next month (if things go around the loop more than once)
- Could report the OPS before the request has closed or after? Make sure OPS is adapted to those SLA successes/failures (e.g. reporting SLAs on previous months).
- Do we want reporting suite to be adaptive (e.g. August reporting suite to be available in September)
 - PQ; don't want to report on an OPS mid-process.
 - OPS now reported upon 'case closure' --> why change?

💧 **CONCLUSION: OAG feels this is already suitably codified. No concerns that bilats wouldn't be able to check that penalty applies only once.**

💧 **Propose good practise built-in on how rejections/deferrals should work?**

- Does OAG feel we need 'good practise', or if the process flow is explanatory enough that it isn't needed?
 - PQ; good practise is advisable (explanatory into some of the detail)
 - EJ proposes 'help bar' on side of form

💧 **CONCLUSION: OAG recommends some form of live on-screen help. Uncontroversial**

💧 **Process flow could go around rejection route multiple times. Do we show rejection reasons for one, each route?**

- PQ; report final but able to view older ones.
- FL; Reporting to facilitate viewing on whether all have been rejected for the same reason?

💧 **CONCLUSION: OAG recommends reporting on the final route of the request**

AOB

- C1a had two flags (verify meter details/supply arrangements) - now we have found C1A actually asks multiple things. How important is it from a data point of view is it to be able to classify which one of these data items it is?
 - DS; they are different questions which means they would be different requests (want clarification in words rather than different data items?)
 - EJ; So are we saying from a process point of view, if you want to raise three C1s for 3 different things, is this the most efficient way to do it?
 - PQ; No, if they are all on the same site, you would want them all included. Ability to add multiple bits of info in? If it is a complex case most things are done and discussed outside of the form/case anyway, but it is still logged under 'meter verification'.
- **CONCLUSION: No firm stance from OAG. No specific tech knowledge of how one or another process sub-type would affect systems. ACTION 3: EJ to feedback to MOSL development team**

💧 **ACTIONS**

1. CD to look into putting a maximum of 'x' days pause on the flow (3 days e.g.) otherwise you have 'reached SLA'? CD/EJ to think about pausing SLA at 1st-2nd attempt at customer contact - e.g. not able to contact customer/this getting misused? Look into having drop downs which give options of timeouts for the Retailer depending on each scenario.
2. OAG agree on the idea of timeouts. CD to look into something to allow the Wholesaler to pause for longer if needed by mutual agreement with retailer
3. Report back to development team that OAG not best placed to make tech decision on process sub-type.