



SCOTTISH WATER

Annual Licensed Provider Survey
Draft Report July 2018



Full colour thinking from Turquoise for Scottish Water

Contents

SCOTTISH WATER	1
Annual Licensed Provider Survey	1
1. Project Background.....	3
2. Objectives.....	5
3. Executive Summary.....	6
4. Sample Background	9
5. Satisfaction with Scottish Water as a Wholesale Provider	14
6. Licensed Provider Satisfaction with High Priority Areas and Teams	19
7. Licensed Provider Satisfaction with Medium Priority Areas and Teams	23
8. Licensed Provider Satisfaction with Low Priority Areas and Teams	28
9. Detailed Perceptions of High Priority Service Areas	30
10. Detailed Perceptions of Medium Priority Service Areas.....	37
11. Detailed Perceptions of Low Priority Service Areas.....	47
12. Online Service Satisfaction.....	49
13. Conclusions and Recommendations.....	53

1. Project Background

In 2018, Scottish Water again commissioned Turquoise Thinking to conduct their annual Licensed Provider (LP) survey using semi qualitative – quantitative research.

All 20 active LPs were contacted (a number of LPs have combined / merged in the last 12 months) by Scottish Water initially.

This year, the survey was slightly different, in that it was split into two parts. An initial short online survey was 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 with in the last 12 months, and their ratings on various metrics across those teams.

Having completed the online questionnaire, the second part of the survey was more exploratory in nature and served to explore perceptions and rationale behind the metric scores given for the individual teams. This took place in the form of a follow up depth interview conducted by a senior Turquoise moderator.

The depth interviews were designed to be 45-60 minutes duration. This timeframe only allowed for depth interviewing around scores given for 4 or 5 teams. Therefore, in instances where LPs had contact with more than 5 teams, Turquoise randomly selected the teams to probe around ensuring a good spread of views across all teams was encompassed within the research.

Using this methodology did mean that we, in certain circumstances, did not gain LPs views across all the teams they interacted with as in previous years, where some but not all, emailed their fully completed semi structured questionnaire back to Turquoise for input.

A total of 15 LPs took part in 2018's survey.

- As in previous years, Everflow, despite numerous contact, failed to make contact with us despite several reminders from both Turquoise and Scottish Water.
- A further 4 did not want take part in 2018, either because we could not get hold of them or they didn't feel their contribution would be useful (Real Water Limited, Sutton & East Surrey Water Limited, Regent Water Limited and Earls Gate Water Limited).
- Interestingly, many of the above did not take part for the same reasons in 2017.

Using an independent company to conduct the survey, continued to achieve a greater buy-in to the research from LPs compared to 2015 where Scottish Water conducted the survey internally, and achieved a total of 6 LPs.

The following report details the findings of the research in 2018. 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.

In 3 cases this year, LPs wished to remain anonymous, 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 2018 and previous surveys. The top scoring team across most aspects was again Account Management. However, the Service Review and Standby Service teams also performed well

Key: Since 2017 **has improved**, **is static**, **is worse**.

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

Service Satisfaction Averages	2015	2016	2017	2018	Change in scores	
Wholesale Service Desk	5.3	5.2	5.4	4.8	-0.6	<p>New teams have been created this year, so direct comparisons have not been done for these.</p> <p>Overall, of those who have YOY comparisons, 3 teams have improved their service satisfaction averages in 2018. Service Review team showed the greatest positive shift, although the sub samples are small and therefore caution needs to be heeded.</p> <p>3 teams saw small falls in their satisfaction.</p> <p>Account Management / Service Review and Standby Service Teams =</p> 
Gap Site and Deregistration	3.5	4.1	4.2	4.8	+0.6	
Metering Services	4.1	4.4	5.3	5.3	-	
Trade Effluent	5.0	5.8	5.7	5.7	-	
Water Byelaws	5.8	5.3	4.9	4.9	-	
Account Management	5.9	6.3	6.4	6.0	-0.4	
Wholesale Billing Team				4.8		
Exemptions and Allowances				5.5		
Development Operations	3.4	4.4	4.3	4.0	-0.3	
Market Data				3.9		
Ascend				5.6		
Service Review Team	4.8	5.2	4.3	6.0	+1.7	
Standby Services	5.4	6.0	5.5	6.0	+0.5	
Satisfaction Averages with Quality of Responses						
Wholesale Service Desk	4.7	4.8	4.5	4.8	+0.3	<p>Overall, 7 teams have improved their quality of response satisfaction averages in 2018.</p>
Gap Site & Deregistration	3.5	4.0	4.2	4.9	+0.7	
Metering Services	4.0	4.5	5.1	5.2	+0.1	
Trade Effluent	4.9	5.7	5.3	5.8	+0.5	

Water Byelaws	5.2	5.7	4.8	5.6	+0.8	Development Operations, and to a lesser extent, Account Management showed a fall for the first time in 3 years. Service Review Team = 
Account Management	5.9	6.2	6.3	6.0	-0.3	
Wholesale Billing Team				5.0		
Exemptions & Allowances				5.4		
Development Operations	3.5	4.1	4.7	3.8	-0.9	
Market Data				4.4		
Ascend				5.8		
Service Review Team	4.3	5.0	4.7	6.3	+1.6	
Standby Services	5.6	5.7	5.6	6.0	+0.4	
Satisfaction Averages with Ease of Interaction						
Wholesale Service Desk	5.2	5.9	5.5	5.6	+0.1	Overall, 6 teams have improved their ease of interaction satisfaction averages in 2018. Gap Sites and Deregistration showed the greatest positive shift. Account Management = 
Gap Sites & Deregistration	3.5	4.2	3.8	4.9	+1.1	
Metering Services	3.8	4.0	5.1	5.0	-0.1	
Trade Effluent	4.9	5.7	5.3	5.9	+0.6	
Water Byelaws	5.7	5.6	4.9	5.0	+0.1	
Account Management	6.2	6.4	6.6	6.4	-0.2	
Wholesale Billing Team				5.5		
Exemptions and Allowances				5.5		
Development Operations	3.5	4.2	4.5	4.4	-0.1	
Market Data				4.5		
Ascend				5.8		
Service Review Team	4.0	5.2	5.5	6.0	+0.5	
Standby Services	5.8	5.3	5.5	6.0	+0.5	
Personal Effort	2018% low (1+2)	2018 % High (6+7)	Previous years comparison			
How much personal effort is required from you to deal with SW	53%	20%	low effort score 26% 2017; 28% 2016; 19% 2015 high effort score 14% 2017; 0% 2016; 19% 2015			

Customer Loyalty	Net Promoter Score	Previous years comparison
This score is based on the idea that customers are promoters, neutral or detractors.	-1%	NPS in 2017 0%; 2016 -31%; 2015 was -37%
Overall Satisfaction Average	2018	Previous years comparison
	5.2	5.4 2017; 5.2 2016; 5.1 2015

4. Sample Background

LPs that took part in the 2018 survey were:

Wave (new venture between merged NWG Business Limited and Anglian Water Business Limited)
Blue Business Water
Castle Water (combining Castle Water and Cobalt Water)
Clear Business Water
Commercial Water Solutions
Three Sixty Water (formerly Kelda)
Brightwater Services
Scottish Water Business Stream
Source for Business (combining Source for Business and SSWB)
Veolia Water Projects
Water-Plus (combining Water Plus and Water Plus Select)
The Water Retail Company
Thames Commercial
Water 2 Business
Pure Limited

Both Water 2 Business and Thames Water Commercial took part this year but had not done in 2017 (did partake 2016).

As with the previous survey, different LPs had varying relationship timeframes with Scottish Water.

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

There have been some changes to the teams in 2018 and hence direct comparisons for a number of teams has not been possible.

- Wholesale Billing has been split into Customer Revenue Wholesale Billing and Customer Revenue Exemptions and Allowances.
- A number of teams have had their names changed i.e. Non Household Revenues Team is now Customer Revenues Gap Sites and Deregistration; Retail Connections is now named Development Operations.
- A number of new teams have been assessed this year: Ascend Team and Market Data – ERRR, Third Party References and Live RV Team.

Where charts have been produced and comparisons to previous years have been displayed, this has been across the last three years (2016-2018), and Turquoise has used shortened labels for some teams and only displayed 2018 percentages to enhance readability of the charts.

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



Sample = 15

Using a similar method to segment the teams as in previous years i.e. into high level contact points (key 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 minor changes since 2016. However, it must be remembered that due to the sample, small changes can have a perceived large impact on percentages.

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 (amongst those that could be compared). Many of the teams had seen decreased interaction in the last 12 months. However, it must be remembered that a number of changes in the marketplace have been observed with companies merging.

Most teams, including the new ones, are falling into medium level contact points. Service Review Team and Standby Services remain low level contact points as in previous years, and the Wholesale Service Desk, Wholesale Account Management, Customer Revenue – Wholesale Billing and Customer Revenue Gap Sites and Deregistration feature in the high level contact points.

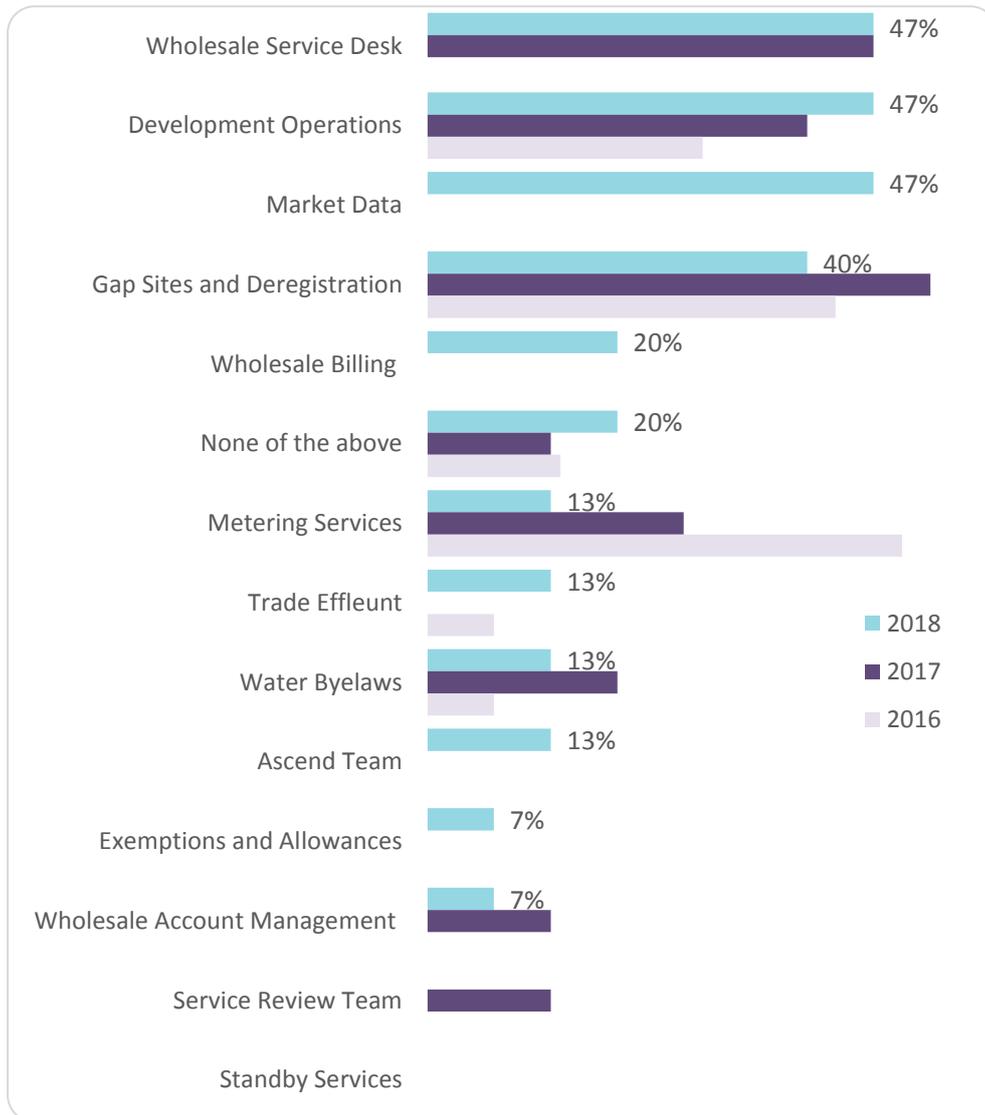
High Level Contact Points (used by >75% of LPs)	Medium Level Contact Points (used by >50% / < 75% % of LPs)	Low Level Contact Points (used by <50% of LPs)
Wholesale Service Desk Wholesale Account Management Customer Revenue – Wholesale Billing Customer Revenue – Gap Sites and Deregistration	Customer Revenue – Exemptions and Allowances Trade Effluent Market Data – ERRAs, Third Party and Live RVs Ascend Team Metering Services Water Byelaws Development Operations	Service Review Team Standby Services

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: Wholesale Service Desk (WSD – 47% = 7 LPs), Development Operations (47%) and Market Data (47%). The WSD and Development Operations had both seen issues reported in the previous year, however Market Data is a new team.

Customer Revenue – Gap Sites and Deregistration Team (previously Non-Household Revenues Team) saw a slightly lower proportion of LPs report issues this year, although in reality this probably just equated to one less LP reporting an issue.

Other slight drops in the number of LPs reporting issues this year included those for Metering Services, Water Byelaws and Wholesale Account Management.

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

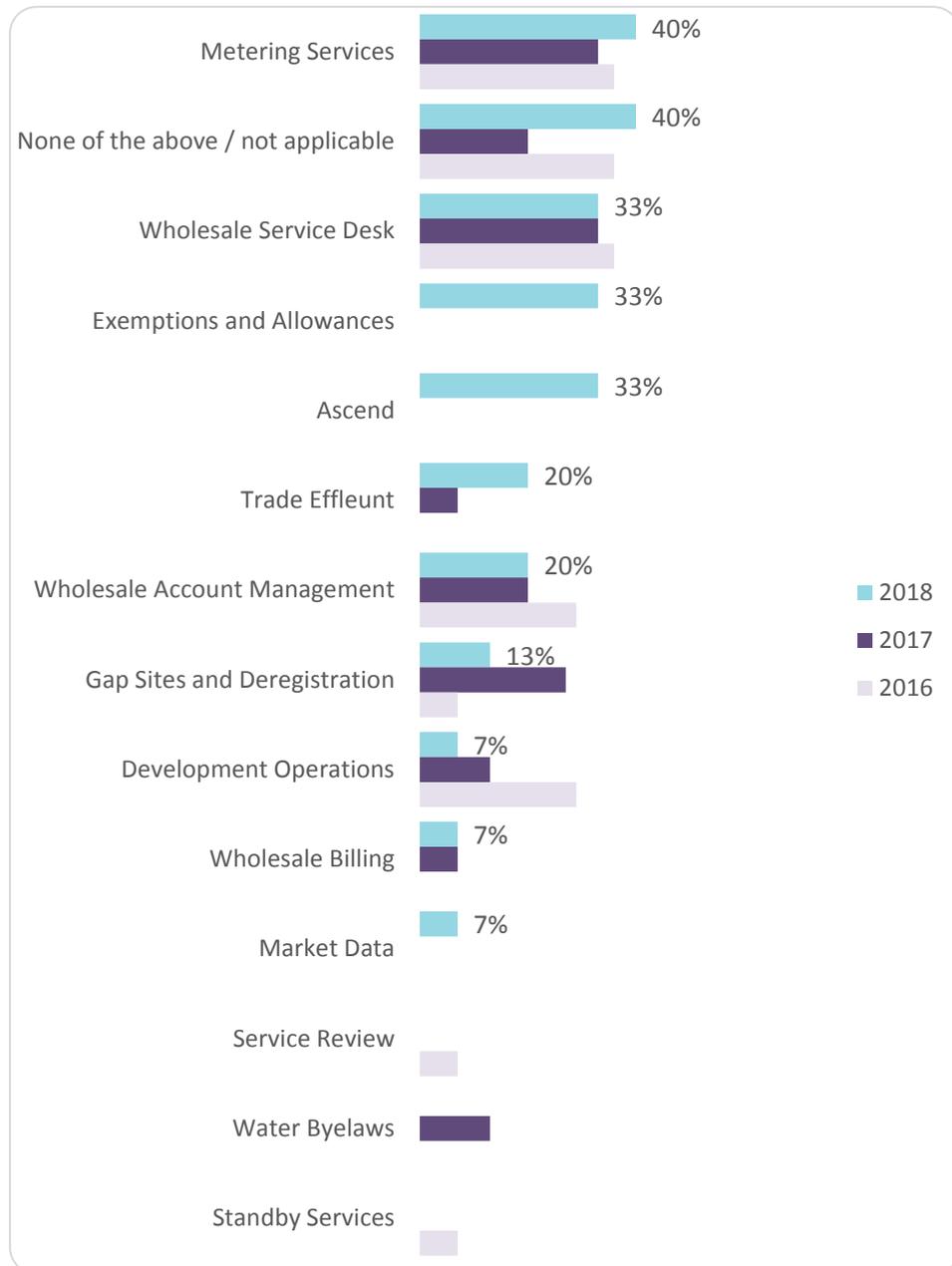


Sample = 15

Metering Services continued its noticeable improvements in 2018, with 40% (6 LPs) reporting improvements in this team over the last 12 months.

Other recognised improvements across 2017 / 2018 (by 5 or more LPs) were also reported for the Wholesale Service Desk, Customer Revenue Exemptions and Allowances and Ascend teams.

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



Sample = 15

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 remained relatively steady at 86% (86% in 2017, 92% in 2016). However, the mean score has dropped from 5.4 to 5.2 which is mainly down to the fact that no LPs gave a top box score of 7, whereas in previous years there has been a couple who had.

Overall similar comments to previous years were made regarding Scottish Water and the service they provide. Perceptions overall are very positive, with some LPs suggesting that improvements have been evident in certain teams across the last 12 months e.g. Metering Services Team. Some LPs are also reluctant to give a top box score with the thought process that *'there is always room for improvement'*.

However, consistent to previous years there are still some inconsistencies between teams which are impacting upon perceptions and scores. As in previous years, more typical teams mentioned were Gap Sites and Deregistration, but also Market Data is often cited here.

'There is always room for improvement but overall they are good. I only deal with a few wholesalers in England but I would put Scottish Water as top - however, they have been around longer.' (Three Sixty).

'Overall the way they work is good. They have a lot of experience and processes in place. I did not give them a 7 as they have a couple of issues which drags them down. Compared to other wholesalers they rank highly.' (Anonymous)

'An amalgamation of good and bad. Some really excellent teams and some not so good.' (Castle Water)

'Generally, they are good, but in some areas where information quality is poor it would be great if we could get decent information in the first place. However, there have been massive improvements in the last ten years.' (Water Plus)

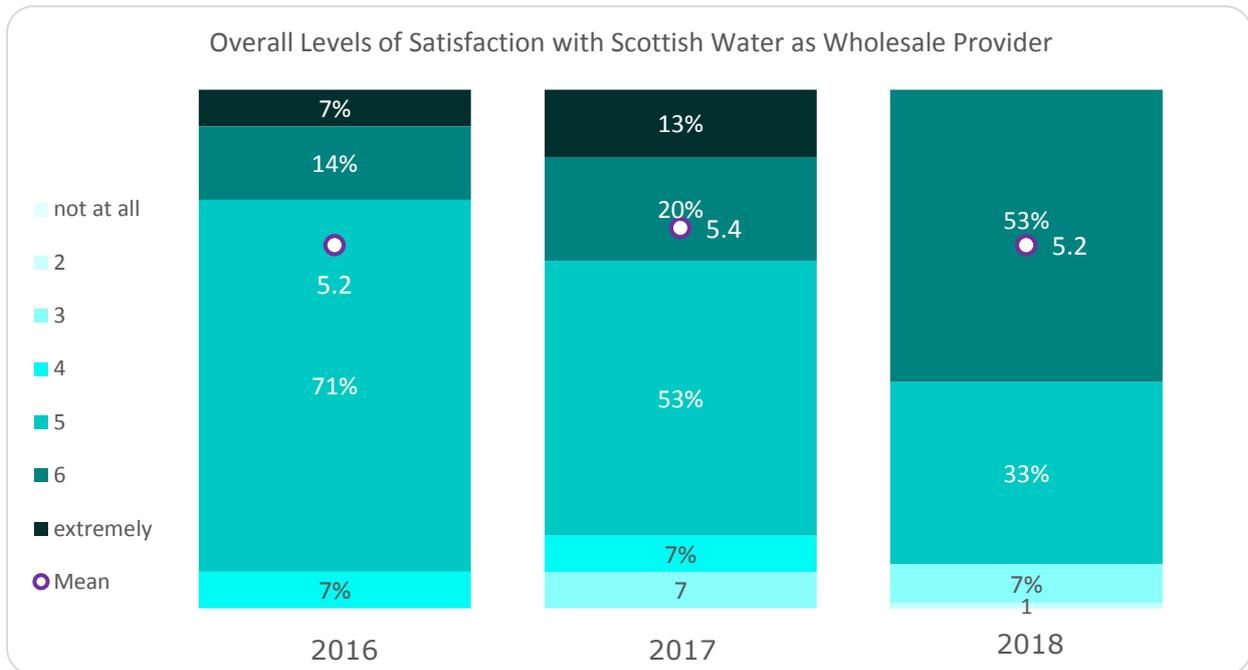
'Happy with the service but there are still improvements needed for departments and services. The positive is that it is moving in the right direction and we have a great relationship with many departments and people who are happy to help.' (Clear Business)

'They are proactive, and trying to improve, but they can be quite bullish as a corporation. They are not perfect but realistically never will be.' (Commercial Water Solutions)

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

Synonymous to last year there were also a couple of comments regarding new team members joining which has been felt to impact on the last 12 months. The lack of knowledge being evident in their quality of responses.

Again, most LPs recognise that Scottish Water are willing to work collaboratively with them to get these issues sorted and that in many instances, although issues may still exist in certain teams, Scottish Water are putting processes in place to improve these.



Sample = 15

Consistent to 2017, 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 (47% - 7) believed Scottish Water compared favourably to other wholesalers in England and Wales. A further 33% could not determine how Scottish Water compare as they don’t operate in the other markets. Only one LP believed they performed worse comparable to other wholesalers.

‘Scottish Water has been going a lot longer and so they have the knowledge. Also, there is only one wholesaler in Scotland. There’s not much that Scottish Water can learn from wholesalers in England & Wales - more the other way around’. (Water Plus)

‘Overall, I would rate them about the same as wholesalers operating in England & Wales. Scottish Water are better in some areas but there are other areas in which they could improve as previously mentioned. More updates and improve their IT. Other wholesalers proactively contact us if there is a major event in an area we are operating in which gives us confidence in informing customers e.g. large-scale leaks, restrictions. discolouration/ boil notices.’ (Anonymous)

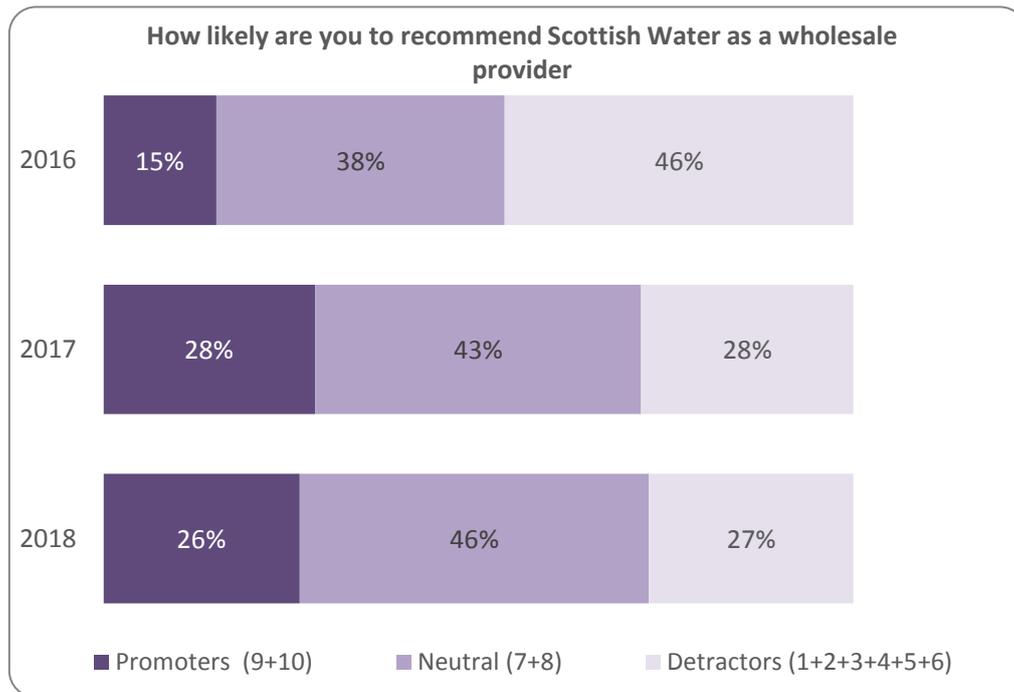
‘We have only had wholesalers in England & Wales in the last 18 months and they have been keen to impress. We’ve built up relationships with other wholesaler service desks. United Utilities for example sent welcome packs, which has given us faces to names plus we can call them direct on the telephone. We have seen improvements in Scottish Water in the last two years and we feel valued. Scottish Water’s portal is much better than Yorkshire Water and United Utilities.’ (Three Sixty)

‘Scottish Water are way ahead of everyone else. Other wholesalers are not up to speed like Scottish Water. Market data is good. Small things can affect a lot of customers.’ (Clear Business)

5.2 NPS

The number of LPs who were 'promoters' and 'detractors' of Scottish Water has remained relatively static in 2018.

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 = 15

'They are one of the better providers and would recommend them based on my own experiences.'
(Anonymous)

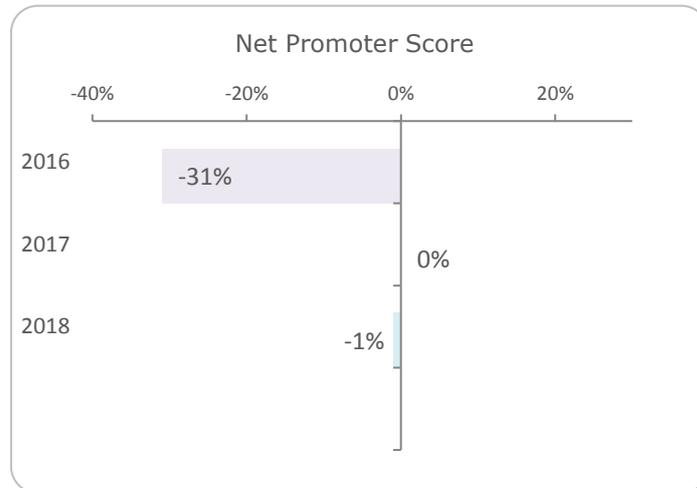
'Generally very happy with the service. I respect them and the account managers know their stuff and are very good. They are keen to learn and address issues.' (Wave)

'They are the only wholesaler that's up to scratch. Their knowledge is good and they are on top of their game. We can rely on them and they are on the ball! English wholesalers rely on the retailer too much.' (Clear Business)

'The only one we have. Mixture of good and bad.' (Castle Water)

'(because of) all the reasons discussed. Lack of productivity. Not giving clear instructions or information about what is needed.' (Water 2 Business)

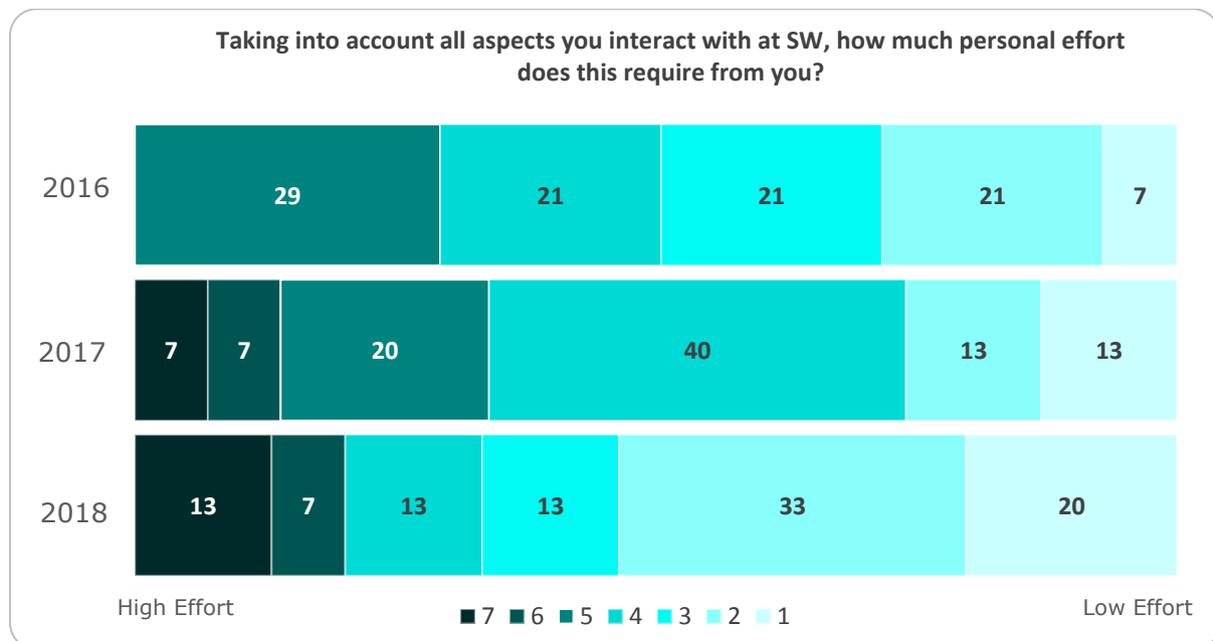
In 2018 the NPS is -1% (previously 0% in 2017), therefore the number of detractors slightly outweighs the number of promoters.



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 chart below we can see that there has been a large increase in the number of LPs giving a score of 3 or less. There are still a few LPs who gave high scores (6 or more) reflecting their frustration in the amount of time required by LPs to sort some aspects out.



Sample = 15

'They are easy to deal with and there have been no problems and so it has not been difficult.' (Thames Commercial)

'If the frustrations could be ironed out the score would be even lower'. (Wave)

'I have to chase quite a lot due to the processes. Contact is not proactive.' (Clear Business)

'The system works effortlessly. I put in a request, they respond.' (Commercial Water Solutions)

'Good account manager, approachable, regular meetings, things are sorted better.' (Veolia)

'They are easy to deal with and get hold of.' (Anonymous)

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:

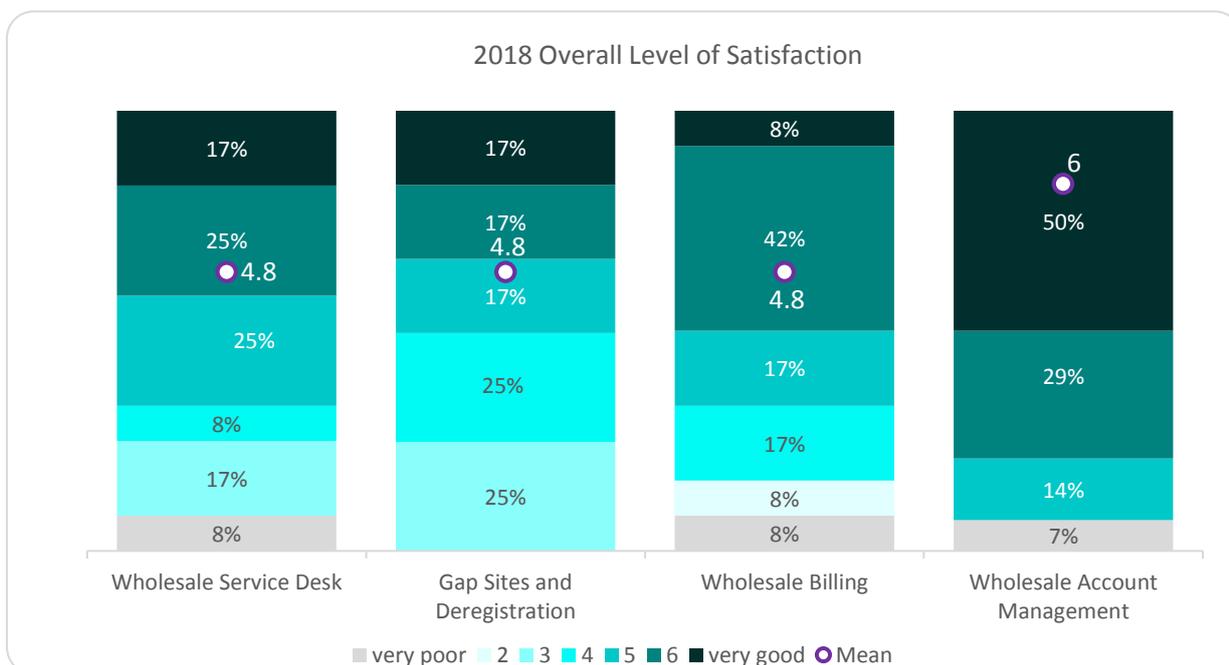
- Wholesale Service Desk
- Customer Revenue Gap Sites and Deregistration
- Customer Revenue Wholesale Billing
- Wholesale Account Management

Equally data provided by the Client on volume usage of each service area allowed Turquoise to segment the areas into low and high usage (as in previous surveys).

- High user = LPs >10 contacts in a year
- Low user = LPs <10 contacts in a year

The above definitions have been kept consistent with the last two years to allow for comparison. Volume data also widely differed between each area. Analysis has been conducted on usage looking at the average scores across all service areas which can be seen later in the report.

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



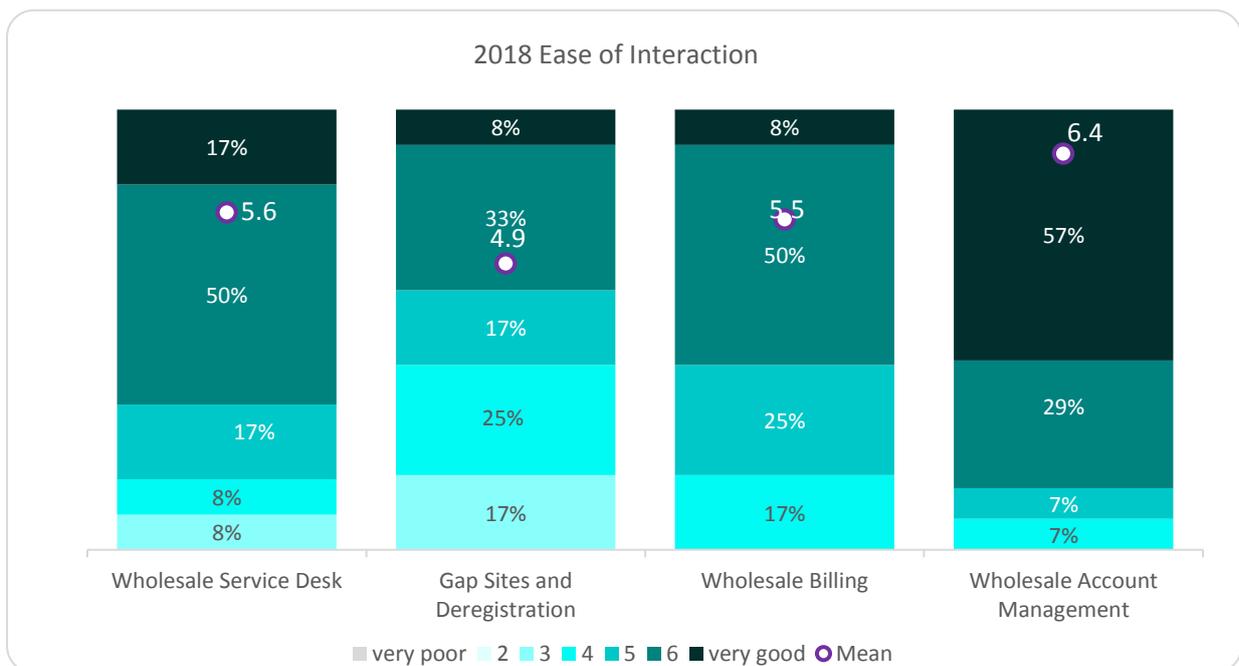
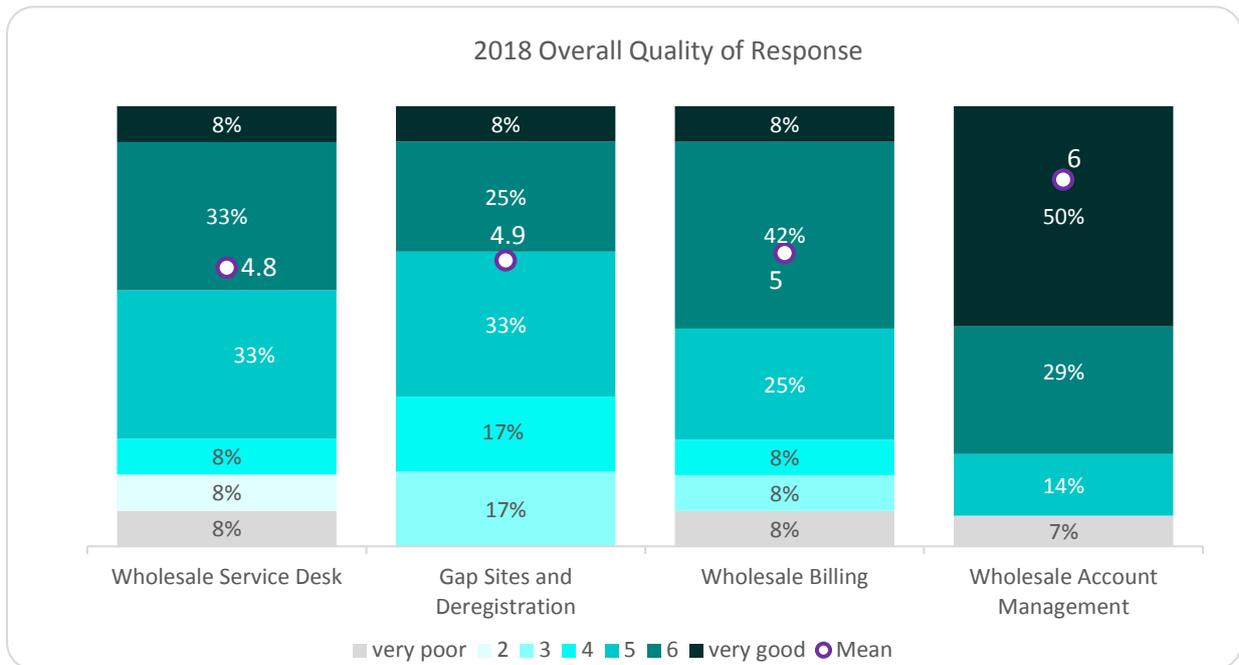
Similar to previous years, Customer Revenues Gap Sites and Deregistration Team gained the lowest mean average satisfaction scores in 2018, and Account Management scored the highest.

However, Gap Sites and Deregistration had improved their mean satisfaction score from 4.2 to 4.8. This was mainly due to the fact that there appeared to be greater variation in scores and more positive higher scores being given. Account Management, whilst achieving the highest mean score again, did

see this fall from 6.4 to 6.0. However, as with all the metrics, any small changes will have a large influence given the small sample size. Account Management are still performing very well and achieve significantly higher means scores than other teams.

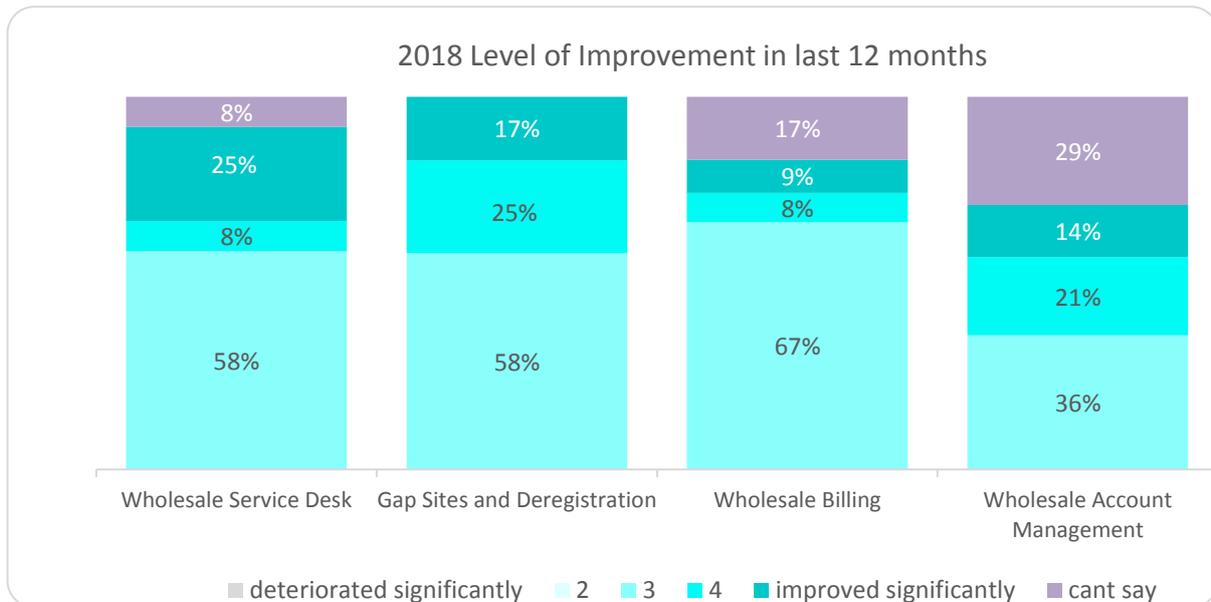
The Wholesale Service Desk also saw a small decline in their mean score since 2017 from 5.4 to 4.8.

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 Service Desk narrowly achieves a lower mean score for quality of responses than other teams this year.



Comparative to 2017, most teams have encouragingly seen increases in mean scores across these two aspects, with the greatest increase witnessed for Gap Sites and Deregistration of +1.1 for ease of interaction and +0.7 for quality of responses.

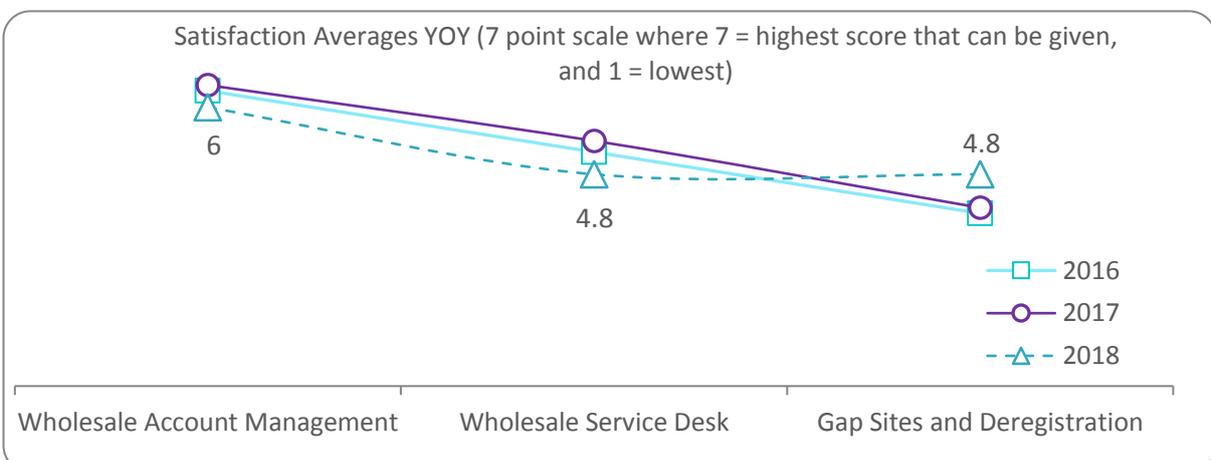
Looking towards improvements in the last 12 months, in the majority of cases, LPs reported teams had 'stayed the same'. Again, this was quite often couched in a positive way i.e. 'they are equally as good' e.g. Account Management. For those who stated 'they can't say' this was mainly because they had not had much contact over the last 12 months with some teams, or were fairly new to the market and therefore couldn't evaluate any improvements.

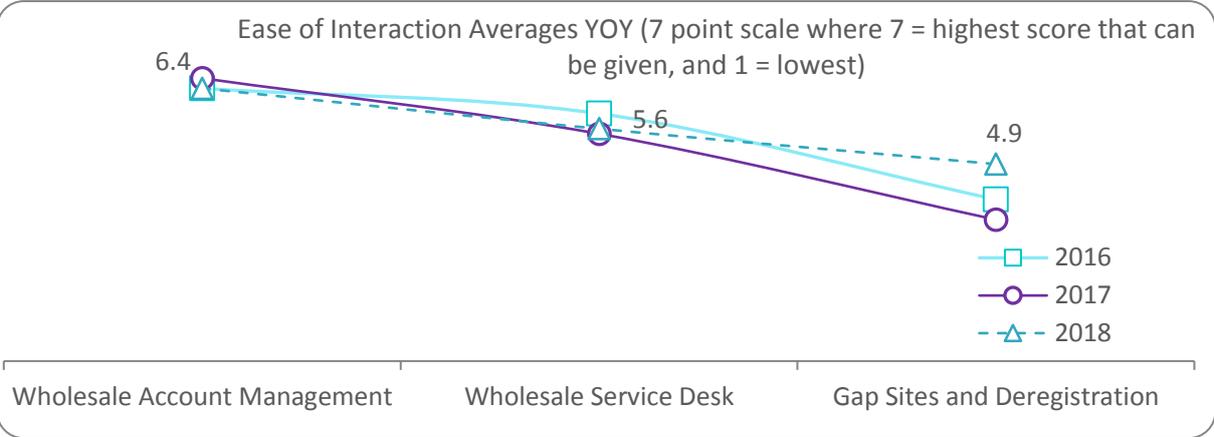
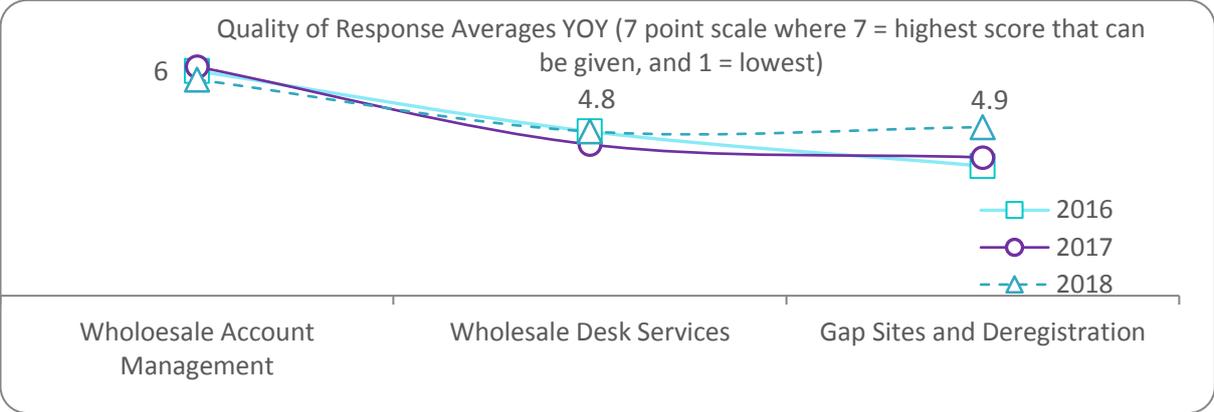


Encouragingly, most significant improvements were evident in the Wholesale Service Desk, but also a couple of LPs mentioned this for Gap Sites and Deregistration.

The following charts plot the mean scores across the last three years for directly comparable teams (wholesale billing has now been split and so this has not been compared to previous years).

Given small subsamples, any shifts should be viewed with caution, however the most consistent improvements were noted for Gap Sites and Deregistration. Whilst this is positive, there are still frustrations with this team which will be seen later in the report, and should be taken on board, however improvements appear to be starting to make some impact.





The table below shows the combined satisfaction scores for the individual teams between 2016 and 2018. Whilst satisfaction scores have decreased for Gap Sites and Deregistration and Wholesale Billing, the table again highlights the increases for these teams for quality of responses in particular. There were very minor decreases for the Wholesale Account Team.

Combined % scores (scores of 5+6+7)	Overall Satisfaction			Quality of Responses			Ease of interaction with		
	2018	2017	2016	2018	2017	2016	2018	2017	2016
Wholesale Service Desk	67% ↓	79%	85%	74% ↑	42%	45%	84% ↑	79%	92%
Gap Sites and Deregistration	51% ↓	69%	45%	66% ↑	46%	18%	58% ↑	31%	45%
Account Management	93% ↓	94%	100%	93% ↓	94%	100%	93% ↓	100%	100%

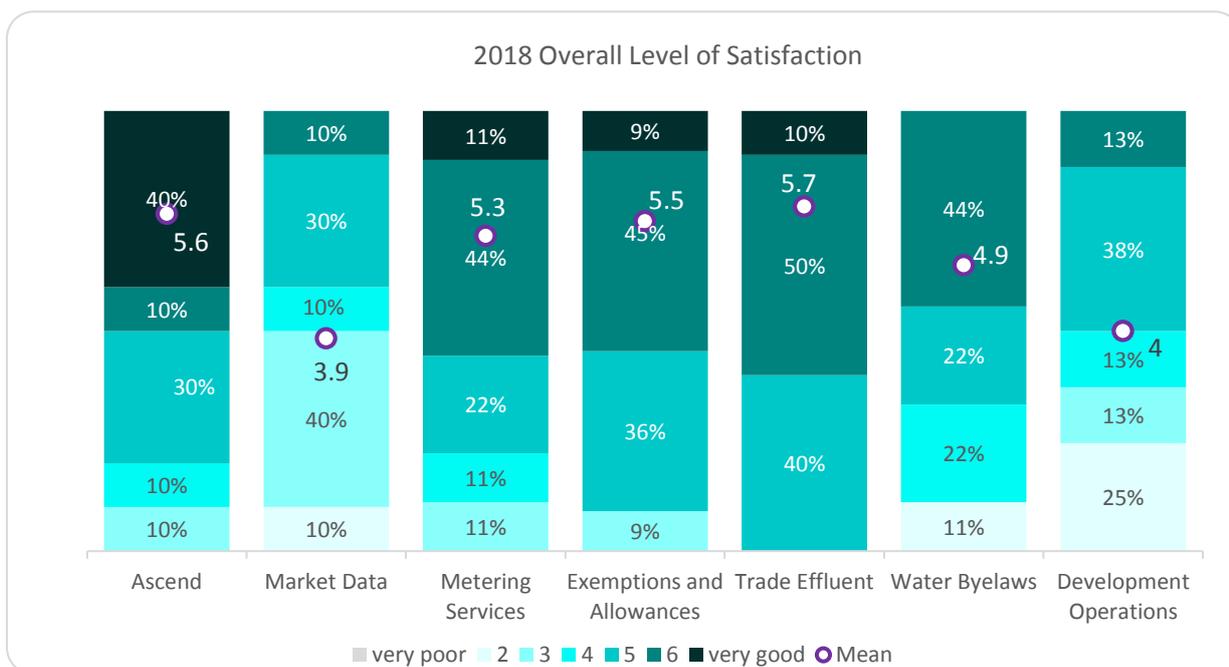
7. Licensed Provider Satisfaction with Medium Priority Areas and Teams

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 – Exemptions and Allowances
- Trade Effluent
- Water Byelaws
- Development Operations
- Ascend
- Metering Services
- Market Data

There are some new teams this year that fall into this category, namely Ascend and Market Data. Retail Connections is now Development Operations, and part of what was Wholesale Billing falls within Customer Revenue – Exemptions and Allowances.

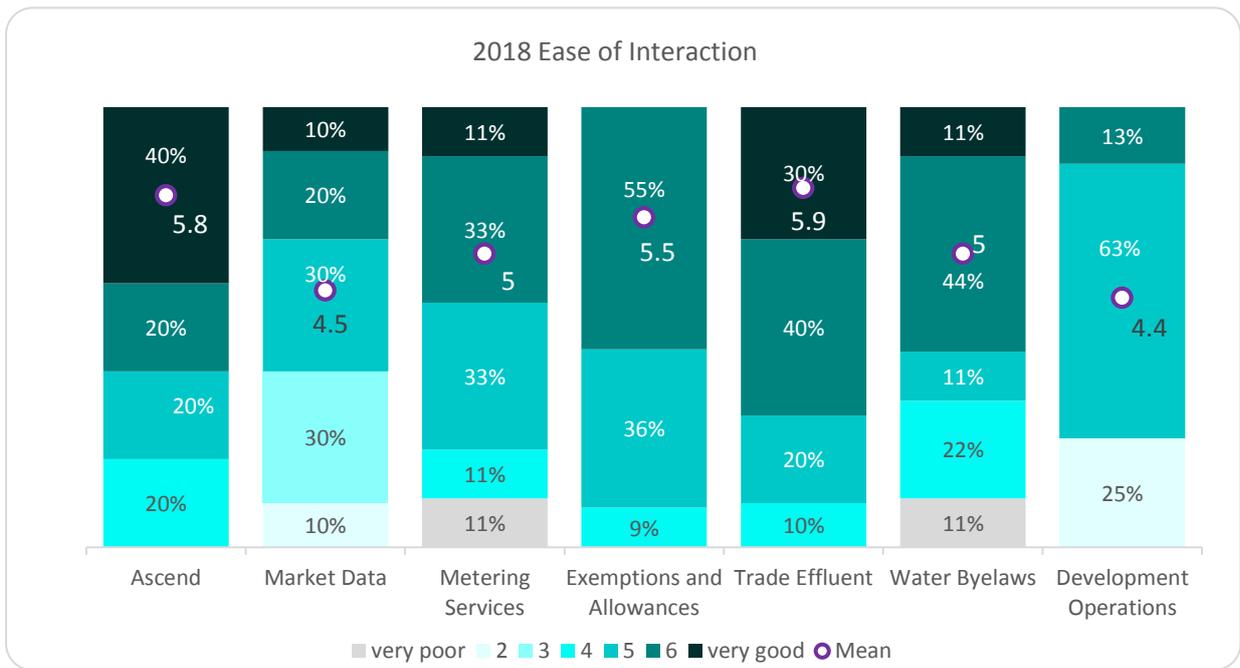
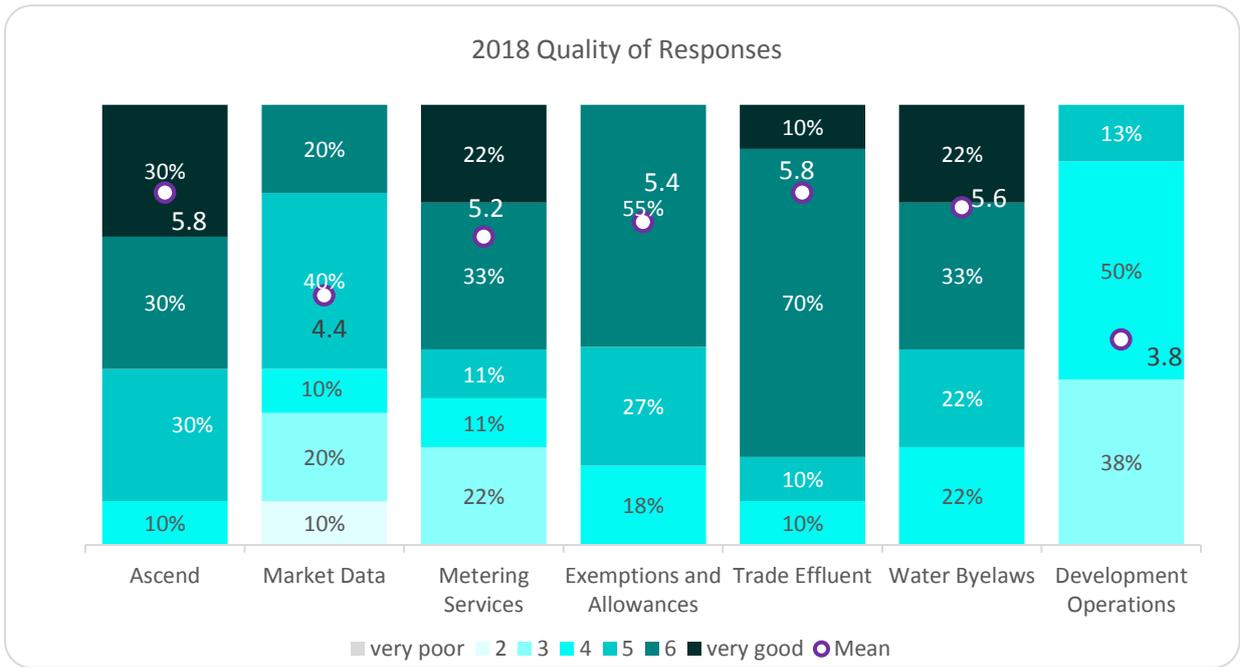
6.1 Levels of satisfaction, ease of interaction and quality of responses



The Market Data Team and Development Operations gained the lowest mean average satisfaction scores in 2018. Trade Effluent scored the highest, although the Ascend team also scored highly and was also most typically awarded top box scores comparative to other teams.

For those teams where comparisons can be made to previous years, many mean satisfaction scores had remained consistent to 2017 i.e. Trade Effluent, Metering Services and Water Byelaws. The mean score for Development Operations had fallen slightly from 4.3 to 4.0.

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



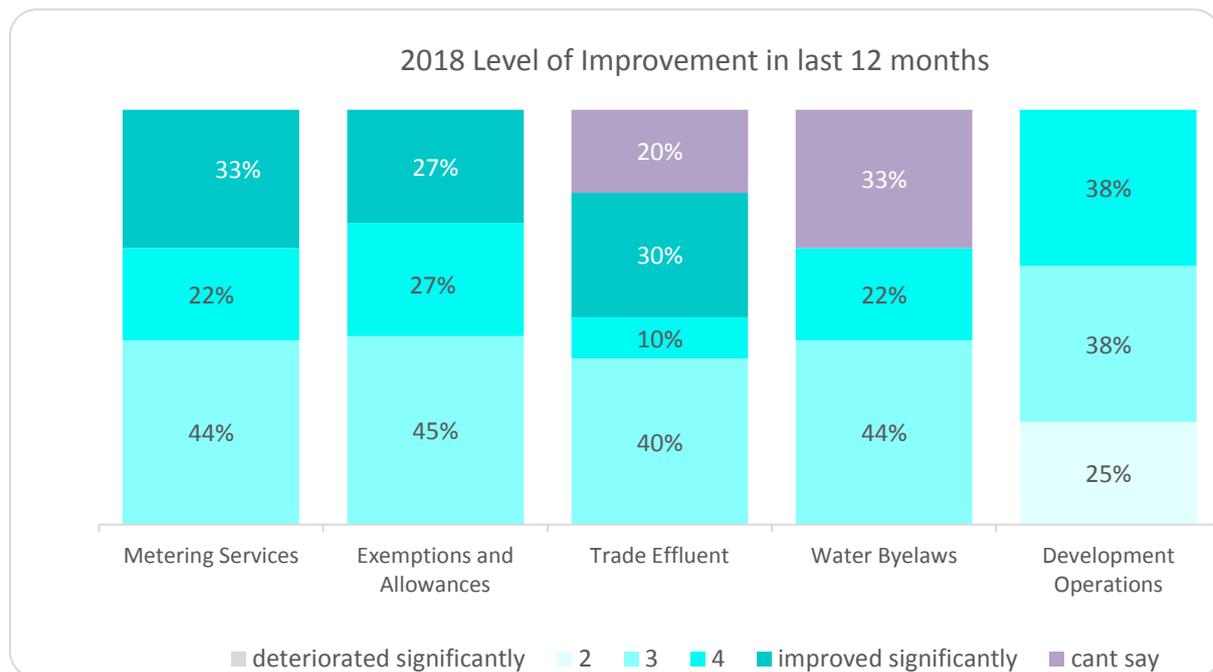
Following on from the satisfaction scores, both Ascend and Trade Effluent teams scored highly for quality of responses and ease of interaction. Water Byelaws was also scored highly in these areas (better than in satisfaction). The lowest performing teams in these areas were Market Data and Development Operations, the latter of which has consistently been scored lower across the last three years.

Comparing to 2017, encouragingly, three of the four teams that could be directly compared actually scored more positively in 2018, witnessing some incremental gains. Development Operations saw a -0.9 fall in the mean score of quality of responses from LPs in 2018, which is clearly impacting upon

satisfaction. However, they do appear easy to interact with, with a very minor decrease of -0.1 reported.

Improvements were most widely again noted for Metering Services, but also for Exemptions and Allowances which has been split from Wholesale Billing. Some improvement was also noted for the Development Operations team, although frustrations were still evident, and LPs can be polarised in their views on this team’s improvement.

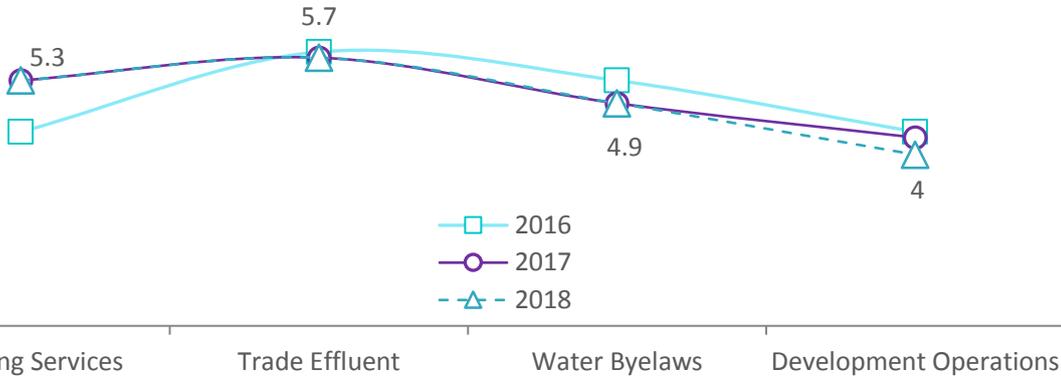
As indicated previously, many LPs stated services as 'stayed the same' couched in a positive way and for those who couldn’t comment, this was mainly due to the level of contact over the last 12 months or were new to the market and therefore couldn’t evaluate any improvements.



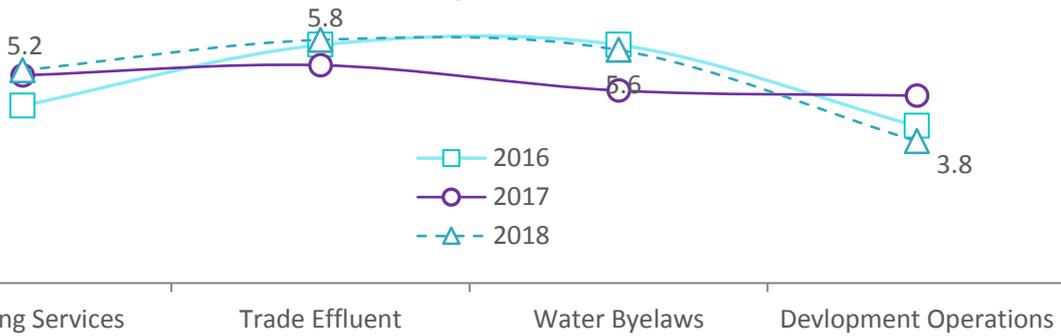
Looking at how averages have moved within the last 12 months, there was quite a level of consistency for Metering Services across all aspects, some positive shifts for Trade Effluent and Water Byelaws, but a negative shift noted in mean scores for quality of response for Development Operations.

Given small subsamples, any shifts should be viewed with caution.

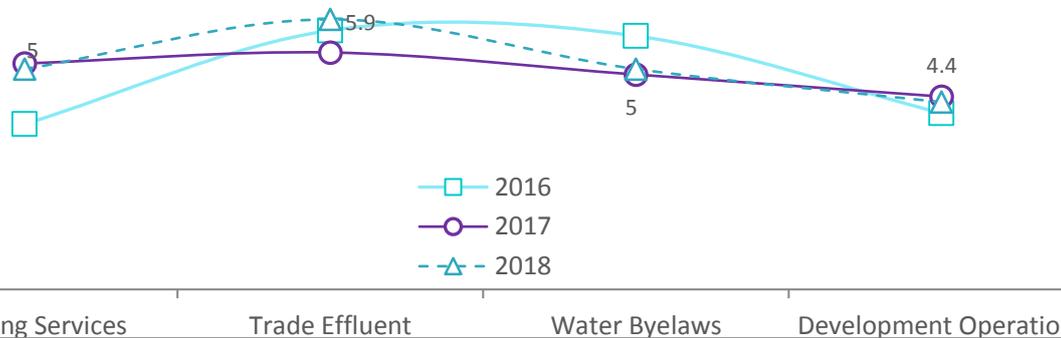
Satisfaction Averages YOY (7 point scale where 7 = highest score that can be given, and 1 = lowest)



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. Trade Effluent and Water Byelaws satisfaction scores have remained constant, with Trade Effluent showing increases in quality of responses and ease of interaction. Whilst Development Operations has seen increased satisfaction and ease of interaction scores, their quality of response score has dropped.

Most areas have increased scores for ease of interaction with the exception of Water Byelaws.

Combined % scores (scores of 5+6+7)	Overall Satisfaction			Quality of Responses			Ease of interaction with		
	2018	2017	2016	2018	2017	2016	2018	2017	2016
Metering Services	77% ↓	78%	64%	66% ↑	64%	45%	77% ↑	71%	50%
Trade Effluent	100%	100%	100%	90% ↑	67%	82%	90% ↑	74%	91%
Development Operations	51% ↑	42%	63%	13% ↓	50%	38%	76% ↑	42%	38%
Water Byelaws	66%	66%	91%	77% ↑	73%	90%	66% ↓	75%	100%

8. Licensed Provider Satisfaction with Low Priority Areas and Teams

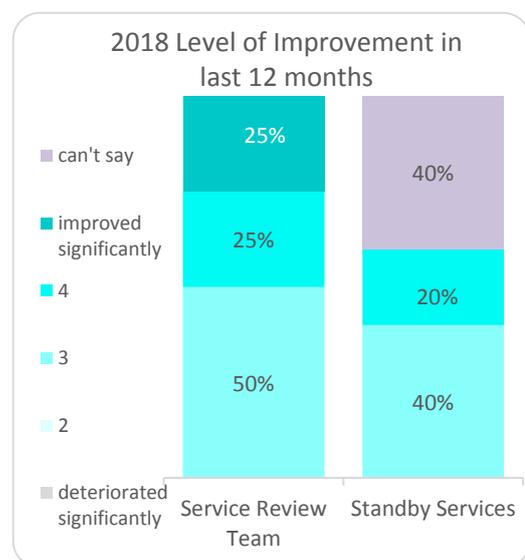
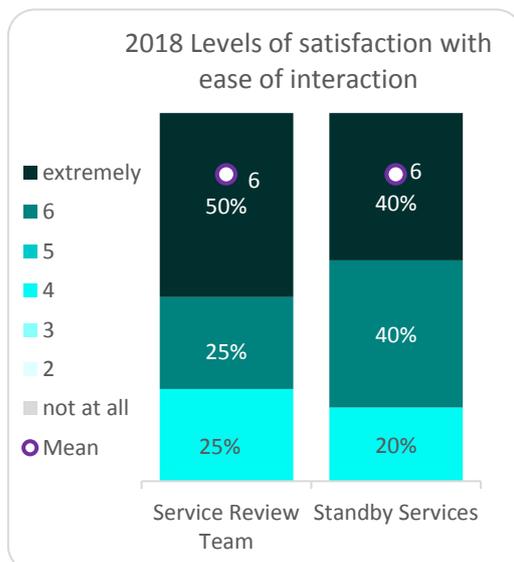
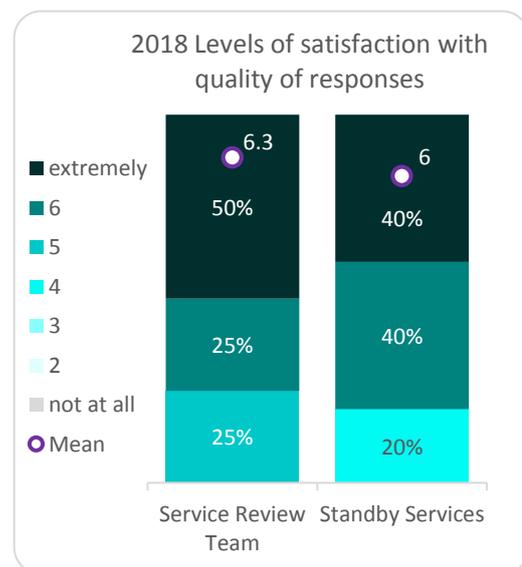
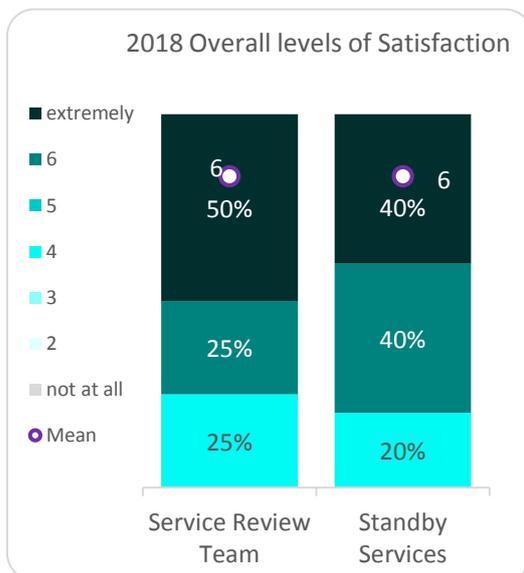
Low level contact areas remained consistent to previous years and included:

- Service Review Team
- Standby Services

Only 5 LPs were able to score Standby Services and even fewer (4) the Service Review Team, hence caution must be heeded when looking at the results and any shifts.

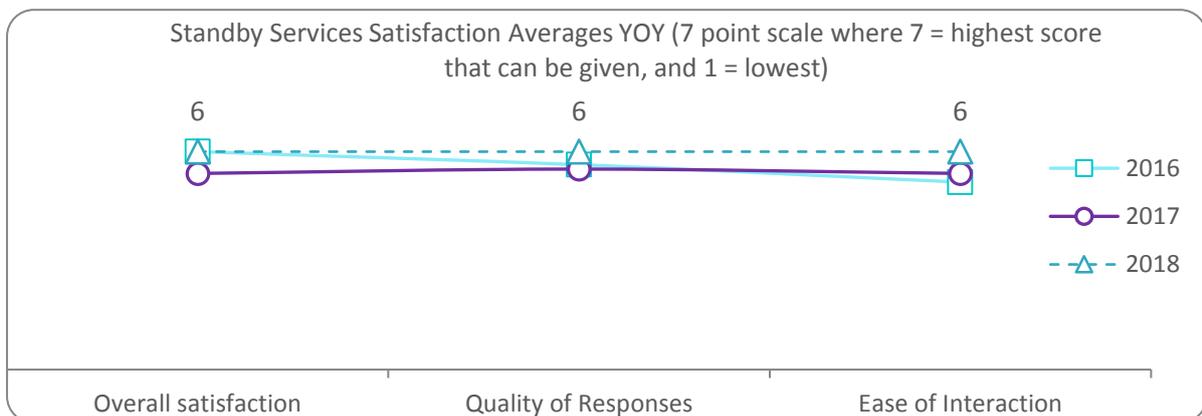
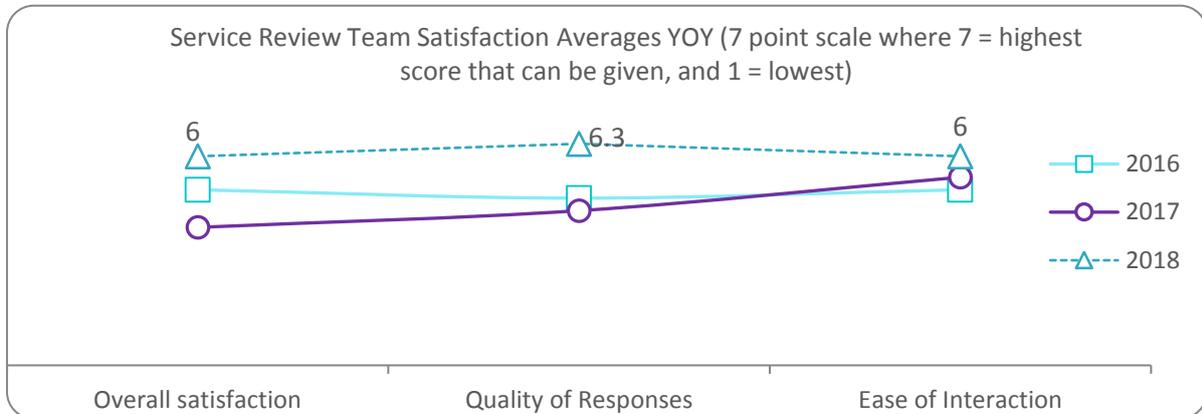
Slightly different to previous years, whilst both teams performed well, the Service Review team performed marginally better than Standby Services.

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



Comparative to previous years, the Service Review Team scores have increased across the board, whilst Standby Services had remained relatively consistent. Caution – small subsamples whereby any fluctuations are emphasised.

Standby Services scores remained relatively consistent.



The table below highlights combined satisfaction scores across 2016 to 2018. Generally improvements have been witnessed.

Combined % scores (scores of 5+6+7)	Overall Satisfaction			Quality of Responses			Ease of interaction with		
	2018	2017	2016	2018	2017	2016	2018	2017	2016
Service review Team	75% ↑	67%	67%	100% ↑	67%	67%	75% ↑	50%	67%
Standby Services	80% ↑	75%	100%	80% ↓	87%	100%	80% ↑	75%	83%

9. Detailed Perceptions of High Priority Service Areas

9.1 Wholesale Service Desk

The Wholesale Service Desk (WSD) once again performed well in the last 12 months, with mean scores achieved not dissimilar to 2017. Consistent to previous years, the key strengths of the WSD are the personnel who are deemed easy to deal with, polite, helpful, and friendly.

The new portal is being recognised as reducing the number of rejections and giving more visibility of queries which is viewed as helping the WSD.

There was one LP who was not happy, and consequently scored the team low. This was mainly felt to be due to the communication and co-ordination between the WSD and other teams being ineffectual.

However, most other LPs are generally positive regarding the communication and response times, with a couple citing improvements by being able to directly email a contact within the WSD (although the ideal would be to have a direct telephone contact). Having a direct contact within WSD doesn't always come across consistently from LPs and therefore is this not widely known amongst them?

Positives of the WSD Similar to previous years	Changes to the WSD Similar to previous years
<p>Staff are friendly and polite and generally helpful.</p> <p>Generally easy to contact – a couple of LPs noticing improvements in this area in the last 12 months.</p> <p>Portal appears to be improving the number of rejections.</p>	<p>Fluctuations in staff and experience levels – referring to new employees.</p> <p>Response times can be a bit mixed</p> <p>Sometimes there is a need for more information, and this could be prevented if the information required is highlighted earlier or made mandatory when submitting a query.</p>

Positive Comments from LPs:

'Communications with this team has become much better. Even though 99% of the communication is by e-mail, it feels a much better relationship. Emails can be sent to individuals on a desk and I get prompt responses. They are easy to deal with as they are always prompt.' (Three Sixty)

'Generally, they are really good, and the speed of response and information provided is relevant. Sometimes you get an automated response or a rejection without any explanation and sometimes the response is not great. To deal with, they are very responsive and helpful. On occasion they've told me how I can chase things up and it has not necessarily been correct.' (Brightwater)

'Ease of contact has improved on last year. For response times, we've had a couple of problems / slip ups in the year. To deal with, this has improved in the last 12 months. One or two instances when information has gone astray. 99% of the time they are easy to deal with. They are easy to contact, information is good and issues are rectified.' (Veolia)

'The portal is good and all the information is on there. You always get an answer although sometimes it might not be a complete answer. They are always really friendly.' (Water 2 Business)

'The quality of response is very informative and helpful, and issues clearly explained. They are keen to help and explain next steps and options. This makes our job easier when we have all the information.' (Anonymous)

'The portal has resulted in significant improvements as it minimises rejections so WSD people do not have to spend so much time looking at the queries. It minimises rejections and so it has been a massive step forward.' (Brightwater)

Potential Improvements from LPs:

'They are polite and go into action, but they are just a liaison person. There seems to be a lack of communication and co-ordination between them and other teams. They are the face, but I would question their effectiveness. With regards to how easy / difficult they are to deal with, I would say they are nice enough people but effectiveness is the issue. They are quick to hide behind market codes rather than apply common sense.' (Blue Business Water)

'Some of the automated responses are not great. The gap site applications are a bit hit and miss. Some customers get an appointment for within 3 to 4 days, others 3 to 4 months which is not ideal. Also, with regards to meter issues, we can let them know a meter has stopped but it can take them a month to respond which means we can't bill our customer which impacts our cash flow.' (Brightwater)

'Response time could be better.' (Anonymous)

'If more information is needed then there should be an explanation of why it is needed. If it's something that is always needed, then it should be mandatory.' (Water 2 Business)

'Contact is email to email. It would be great if we could get the odd telephone call which would be better for relationships.' (Three Sixty)

'There seems to be fluctuations in staff and experience levels. A lot of responses are not being investigated and there are a lot of standard responses with no clarity. Seems to be more of that right now and responses are not taking into account the context. This is the first point of contact and if you can't get through this barrier it is frustrating and results in having to involve the Account Manager more and more. To deal with this team varies depending on who you get. They do a tough job and they can be great. The good people have been moved and the current team are less experienced but this will improve over the next few months. Ultimately, the quality of response comes down to the individual's level of experience which seems to have declined in the last few months.' (Castle Water)

9.2 Gap Sites and Deregistration

The overriding feeling towards this team is perhaps one of improvement, which is backed up by the scores, but there is still room for further improvement.

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

Positives of the Gap Sites and Deregistration	Changes to the Gap Sites and Deregistration
<p>More helpful</p> <p>Better direct contact now.</p> <p>Better tracking of SPIDS</p> <p>Response times can be mixed.</p> <p>Many have monthly meetings with this team which appears to have helped.</p>	<p>Issues appear to be around Gap Sites more than Deregistration.</p> <p>Timeframe for response can be poor.</p> <p>For one LP – there is a lack of awareness of any escalation process, whereas others were aware of an escalation process.</p> <p>Forms can be seen to be very rigid.</p> <p>Desire better pre-warning of surveys / visits – currently can get notification on the day whereas the desire is for at least 48 hours pre warning so LPs can inform their clients.</p>

Positive Comments from LPs:

'They have become a lot more helpful and now we have a direct contact. Previously we had to go through WSD and this stalled the process. Generally, (queries) sit in a queue which doesn't help anybody. We get notification of surveys on the day. Ideally, we would like to know 2 days in advance so that we can let the customer know. There was a delay in getting a SPID actioned. However, this is now better, prompter in their investigation and it has speeded up the process. The processes seems to have improved and the tracking of SPID's is better and more proactive -LP's know what SPID's are available. Processes definitely improved.' (Brightwater)

'We don't have much dealing with this department - not dealing with Gap Sites - opted out! They are hard to deal with. More about tracking down customers. Quite a difficult area generally on gap sites. De-registration info is informative though. Done in a timely manner. Inform us before transaction. As an organisation we contact them once a month. Information forms provided are clear. Clear guidance on what they expect. Give timeframe for our response.' (Anonymous)

'This is probably the team which we have most interaction with. The majority of our work is with this team. On the whole they are very good, professional and get to the problem quickly. Sometimes queries do not include the LP's reference number and so it is difficult to trace back which is a minor issue.' (Pure Utilities)

'Their communication back to us is pretty good and timely. The work seems to happen!' (Commercial Water Solutions)

'Monthly meetings. Easy to get hold of them. They do try. If you do escalate then they are on the ball.' (Water Plus)

Potential Improvements from LPs:

'Gap sites are slow to respond but no issues with deregistration. There are teams within teams. Think it's a high volume issue - gap sites brought into the market, ask SW for information, individual e-mails sent but there is no response or acknowledgement. In other teams there would be an escalation process but this is not in place for gap sites. No KPI. No portal. When they do come back with the report the information is good. With regards to dealing with them, there is no escalation process. I don't understand why we don't have an escalation process with the gap team.' (Clear Business)

'I have only used them a couple of times. The forms which you have to complete are too rigid and will not allow you to write in additional specific information.' (Commercial Water Solutions)

'Whenever you e-mail this team you have to ask for more information. With regard to Gaps, the process can take ages, sometimes up to a year, before they are brought into charge which means the customer is getting free water. We do escalate these cases if it gets too long. In the past year a lot of customers have been having free water but the situation is improving. With regards to the de-registration team it is difficult getting the information from them.... and there is much toing and froing. You can get hold of this team easily enough and we have monthly meetings.' (Water Plus)

9.3 Customer Revenue – Wholesale Billing

On the whole, this service area performed reasonably well in 2018.

Most LPs seem to have little major to gripe about with this team. Minor issues are still mentioned around non-primary charges and having to dispute them because they have been wrongly charged.

One LP discussed payment terms on non-primary charges, whereby if disputed, the team can take quite a while to respond – often responding to a dispute the day the invoice needs paying, leaving the LP little time to resolve if any.

Although this team has been split this year and hence no direct comparisons have been made with previous years, anecdotally, previous issues had been around visibility of non-primary charges and splitting out of invoices. This year, there seemed less comment around visibility thus giving the impression that this side of things has improved in the last 12 months.

Positives of Wholesale Billing

Quick to respond (although some dispute this).

Willing to help.

Timely invoices.

Not too many issues.

Changes to Wholesale Billing

Payment terms not flexible enough. Often response times of the team to challenges on non primary charges is too slow and falls on payment date which is not good enough for LPs.

Only email contact – would like direct telephone contact.

Positive Comments from LPs:

'The invoicing team are quite good and there have been no issues. They respond quickly as you would expect. They are average to deal with and there have been no real problems.' (Anonymous)

'They do respond quickly but they assume we have more knowledge than we actually have as they don't take into account that this is our first time. We have no named contact, and there seems to be overkill with automated emails to shared inboxes. Invoices are clear, simple and easy to understand. The reconciliation invoices are very good and simple. The processes seem good. As a team they are a lot more on the ball and speed of invoice quicker (operate in England & Wales only). Communications are useful.' (Anonymous)

'The quality is good. In fact better than average, very good. Response is good again as there have been no problems. To deal with, again, very good, there have been no problems.' (Thames Commercial Water)

'They have improved over the last few weeks. They do come back with evidence/ information but it's the way it comes back that is the issue. We do get the responses we need eventually.' (Clear Business)

'This is all about communication and their communication is very good and prompt. They are on top of their job. Communications have now improved. Improvements have helped with the tracking.' (Veolia)

'Invoices come through with an attachment with a breakdown of what we've been billed for. Quick reference point if we need to appeal. They pay on time. No issues.' (Pure Utilities)

Potential Improvements from LPs:

'Had issues around non primary charges where we were receiving invoices for things we shouldn't be billed for. We have to challenge quite a few of these. We can email but not telephone them directly which would be easier. Although if you put some stuff through the portal then it gets time stamped

and then there is a timeframe. Whereas if you phone directly then this might not happen, so I guess it is balance.’ (Wave)

‘Not much of a process set in place. Due to incorrect pricing there are a high volume of charges that need to be disputed and every invoice has to be reviewed. Responses are all over the place and confusing for both parties. It needs a set process. They are difficult to deal with as there is only one central email for wholesale billing and no direct number to call when chasing. It would be good to have a dedicated person to speak to.’ (Clear Business)

‘They take too long to reply to queries. Often they reply on the day payment is due which is not good enough. It might be within the SLA’S but it still isn’t good enough. This has been mentioned before but nothing changes. To deal with, they are easy to get hold of; it’s just the response is not great. If we do have to challenge an invoice there isn’t enough time to respond to their response. There should be some leeway on their payment terms, they should extend the payment terms. The issues are with the settlements.’ (Water Plus)

‘We do have some issues but nothing that can’t be resolved. Had issues with non primary charges for admin charges which we’ve queried but have been resolved quickly generally in our favour. We have had to chase on occasion when a little bit more detail has been required e.g. need our reference number.’ (Pure Utilities)

9.4 Wholesale Account Management

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

Once again, the support provided by Account Managers is highly praised amongst most LPs. There were a couple of LPs this year who did have some negative feedback which were also perhaps fed by their frustrations generally.

Positives of Account Management	Changes to Account Management
<p>Very easy to deal with.</p> <p>Very supportive and committed to solving any outstanding issues.</p> <p>Make LPs feel comfortable about asking questions.</p> <p>Very prompt to respond.</p> <p>Dedicated team.</p>	<p>A couple of LPs mentioned feeling like their AM’s were paying lip service without actually getting issues resolved.</p>

Positive Comments from LPs:

'I gave them a high score as they are very, very good to deal with. They are spot on and communicate without hesitation. They always do their best and they are easy to contact and give confidence when needed.' (Three Sixty)

'They are helpful and come back quickly on queries. They organise training and are good at offering training and keeping in touch. The quality of response is quick and the level of detail in the communication they send is good. They are easily contactable. The level of contact is decided by us. This is good compared to other wholesalers who can be pushy. At SW the account managers are full-time unlike other wholesalers who have account managers with other roles as well. There is a dedicated team at SW.' (Anonymous)

'I have only had 2 account managers in 10 years and the current one is very good. If you get to that level you deal with people who know what they are doing and are proactive. Response is clear and quick and you get a personal follow up phone call.' (Commercial Water Solutions)

'The account manager Wullie Sutherland is easy to deal with. Get hold of easily. Always very helpful and advise. Respond in timely manner. Very knowledgeable and experienced.' (Anonymous)

Potential Improvements from LPs:

'Generally, around the same issues as Market Data. It doesn't feel like they pass our information on. No go between, they just pass us on to the relevant team. We get missed as don't have the volume of customer base. Simple requests are dealt with quickly and easily.' (Water to Business)

'They are well intentioned, polite but not effective. Same comments as before. We spend an inordinate amount of time going over the same issues. We wait for things to happen but they don't happen. They are ineffective. They get things wrong. You can get hold of them. They need to be able to do the job properly and be more effective and use their common sense. We have gap sites that are brought into market but should not have been. For example, we have one customer where the building has been demolished but the meter is still there and so they are charging us wholesale charges despite us telling them there is no building there! There are a number of cases like this. No common sense.' (Anonymous)

10. Detailed Perceptions of Medium Priority Service Areas

10.1 Metering Services

Metering Services performance has remained relatively consistent across the last 12 months. There have been some positive improvements since 2015 which are reflected in the mean average scores it receives from LPs. However, experience of this team can be mixed with some having great experiences and others poor.

Issues raised are again around appointment times for onsite visits which is important for some LP customers from a security issue perspective. There was less negative comment around subcontractor work this year, which is a positive.

Positives of Metering Services	Changes to Metering Services
<p>Some LPs perceive they are receiving quicker, improved responses. However, there are other LPs which feel the opposite.</p> <p>Subcontractors appear better.</p> <p>Information improved for some</p>	<p>How long it takes to decide if a meter is being exchanged.</p> <p>Again, consistent to previous years, some end user customers need better prewarning of appointment times for visits due to security issues – SW should have an appreciation of this.</p>

Positive Comments from LPs:

'They have really changed this team in a positive way. The information is great. Contact information is great. They allow a specific date and time for customer contact. We do have the odd issue with a subcontractor but even this has got better. They are very amenable with requests.' (Water Plus)

Potential Improvements from LPs:

'Responses are slow 75% of the time when meter is being exchanged we need to know quickly and this takes too long, this more than anything is a bugbear of mine.' (Brightwater)

'The forms are rigid. The process is not correct but they are very quick to deal with faults/ issues'. (Commercial Water Solutions)

'The meter replacement programme which is happening. Sites dealt with can be sensitive e.g. nuclear sites. We have told them (SW) numerous times about the notice needed to access these sites. They contact us on a Friday saying they'll be there on Monday! Working on a short timeline. Communications need to be improved. Working to set timeline, not taking into account end user and how to access the meter. Customers might want a months notice.' (Veolia)

'The work is often incomplete and the quality of work isn't great either. Communication is not great. Level of response is not great and we can't contact people directly, we have to email and there is a lot of challenging. The built up frustration is reflected in the scores here- wrong data, poor communications, no direct communication.' (Castle Water)

10.2 Trade Effluent

Scores for the Trade Effluent team remained consistently high across most aspects again in 2018. They were again the second highest scoring team across satisfaction, ease of interaction and quality of responses.

There were a couple of negative comments from a couple of LPs.

Positives of Trade Effluent	Changes to 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>Training has helped LPs understand the service better and has been offered.</p> <p>Portal improvements cited by a couple of LPs.</p>	<p>Some feedback around staff dealing with applications within this team being quite rude and difficult to track down.</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>Level of detailed information requested seems more than what is required at times.</p>

Positive Comments from LPs:

'This team are held in high regard and I have no real comments to make.' (Wave)

'They offered training in the first instance and were helpful and knowledgeable. There is a lot of knowledge in the team.' (Water Retail Company)

'The process of contacting them has improved slightly with the portal although the output is still very slow.' (Veolia)

'Not had much dealings with this team, as currently have no trade effluent customers. But if we did they have given us some information on this area. They have offered to host training sessions if we want them, so feeling a bit more prepared. They are very open, accommodating and easy to talk to.' (Pure Utilities)

'Compliance side is good.' (Castle Water)

Potential Improvements from LPs:

'The level of information they ask for is more than is required. They ask for drawings that are not available. Fallen foul of the errors of the WSD team. Don't deal with many.' (Veolia)

'Seems to be different teams within this team. In applications, the communication is poor, and you can't track them down. I don't like the tone of their emails and their attitude which is very abrupt and rude (mainly around applications).' (Castle Water)

'We have to post G02 forms as they cannot be sent by email which is a real nuisance. We do a lot with other wholesale service providers e.g. Thames, and they allow us to email a scanned version. Scottish Water are not as good at updates as Thames' (Anonymous)

10.3 Water Byelaws

Overall, the Water Byelaws team has continued to perform well in the last 12 months. There was an improvement in the mean score for quality of responses for this team.

Generally, this team was seen to have remained consistent in their service in the last 12 months by just under half of LPs (44%).

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	Changes to Water Byelaws
<p>Kept updated on inspections.</p> <p>Good communication for some – hands off.</p> <p>Invitation of this team to LPs to explain Water Byelaws.</p>	<p>Inspection times are not disclosed to LPs.</p> <p>Tends to be all one way communication with end user – some comment about the team being rude if customers call the team.</p> <p>Communication can be ambiguous – if the relationship is only with end user, they need to be more clear about any charges for failed visits etc .</p>

Positive Comments from LPs:

'They are ok. We have a good consistent relationship. We have had no problems hence middle of the road scores.' (Business Stream)

'Recently trying to be much more prevalent with LP's in the last 12 months. There have been a huge number of leaks in the SW network. SW have reduced the pressure in certain parts to help with the leaks. Water leaking from the customers pipework back into the mains due to the differences in pressure. Every so often you get a letter or email saying they are going to inspect the property. All works fine. Customer doesn't really like it. System works. Letters are clear. Invited LP'S in to know what byelaws are - a great slide show that shows what the problems are and what causes it. Very effective.' (Commercial Water Solutions)

Potential Improvements from LPs:

'The water police! They will tell you what they have done. In terms of dealing with them, LPs can't speak to them. They are abrupt and rude. They are very quick to not support the customer. They need to communicate with the customer at all levels as the LP's have no input or say. If they impose charging on the LP, don't tell the customer the LP 'may' pass the charge on. They need to contact customer and tell them they will be charged for failed visit. Be more transparent and take ownership.' (Castle Water)

'The team are generally unresponsive and we are not able to communicate with them easily. There is no direct email into the team. When we go through WSD, the message goes to the team but, we do not hear back. They give us no updates on visits.' (Wave)

10.4 Ascend

A new team that was evaluated this year, the Ascend team. Overall the mean scores achieved were high, showing good performance.

Exploration of the team and the portal in more detail highlighted general positivity. The portal seems to have made a big difference to those who had used the previous system. It's much easier to navigate, made the process much easier, improved communication between LPs and Scottish Water, given control back to LPs and improved visibility.

There have been a few teething problems and some of the IT could be quicker, but generally the team are good at resolving any issues and are deemed very helpful by those who have had to use them.

Any negatives were minor.

Positives of Ascend	Changes to Ascend
<p>Good feedback generally.</p> <p>Helpful.</p> <p>Resolve issues.</p> <p>Communication is generally good.</p>	<p>No direct person to call if needed – would be the ideal.</p> <p>One LP did mention that feedback was a bit slow, but this may be due to the mechanism of logging a problem i.e. via email vs telephone call.</p> <p>Some areas of the portal are a WIP which has perhaps not been communicated to LPs.</p>

Positive Comments about the team from LPs:

'As with any IT system it's great when it works. They've (the team) been helpful when we have had issues. Length of time it takes to get back not ideal, but this is due to teething problems.' (Water 2 Business)

'They are a good team. We have identified a few issues with the portal and they have found and resolved the issues. Their response is strong, very good.' (Pure Utilities)

'I do not have much liaison with this team. I receive emails from them. The communication with regards to the portal is good and the information that they give is detailed.' (Three Sixty)

Positive Comments about the Ascend impact:

'Feedback has been very positive. We are seeing the benefit and I have only heard positive comments. It is now more efficient to submit applications and the performance reports are good.' (Wave)

'It has had a positive affect and simplified processes (retrospective amendments). The team themselves have been very helpful. They could do with a bit more awareness of future around LPNS and a bit more detail so we can adapt. It has helped with ease of using in particular Trade Effluent.' (Business Stream)

'It has given us some control back. It is not as intuitive as it could be. The GAP sites have slightly different headings. Could do with a bit of SW using it to see how it works from our point of view - needs to be less technical.' (Commercial Water Solutions)

'Yes, it has made a difference. The visibility for the LP's is much better. The ability to suggest improvements and they are taken on board. We used to use MS Dynamics in our old platform and the reason we moved away was down to speed which isn't great.' (Pure Utilities)

Potential Improvements of the team from LPs:

'They're always there and they acknowledge you. You can tell it's a quite a small team and perhaps they don't have the depth within the team to deal with the volume.' (Water 2 Business)

'I had a lot of questions when it was launched so more training would have been good. Speed is an issue. Also, some forms cannot be done on the portal and engineers photographs can't be seen.' (Clear Business)

10.5 Development Operations

Fewer numbers of LPs had had contact with this team in the last 12 months (53% vs 79% in 2017). Comparative to other teams, this team has perhaps always scored lower across most aspects over the last three years. This year, the mean satisfaction for this team fell slightly, but the ease of interaction remained relatively stable.

Perhaps the most notable change in 2018, is that the quality of response score for the team has dropped -0.9 points comparative to 2017. This appears to be where the frustration is for LPs.

Unfortunately, whilst there may have been improvements since the opening of the market (2008), this team still has the same frustrating issues for LPs and therefore there is little positive comment around the team. It is not on the Ascend programme just yet, but one LP did mention their awareness of changes afoot for this team, which they were hoping would help change things.

Positives of Development Operations	Changes to Development Operations
Individuals within the department are helpful to a degree.	Communication and update provision is poor. Whole process and system is too long. More information and clarity on process and the timescales from start to completion is required. KPI performance is erratic. LPs often have to chase this team.

Positive Comments from LPs:

'They are knowledgeable and there is a contact number for this team although if you call the department you get a different adviser each time. They are really helpful on the phone but usually they ask you to send an e-mail and this is where the process breaks down. Individuals are helpful and communication is fine, but the systems and processes are not helpful.' (Clear Business)

Potential Improvements from LPs:

'The only time I have had a liaison with this team was in March 2018. It was for a new supply & connection for one of our customers and we went through the right channels. I didn't get much back from Scottish Water. The customer needed it done in March and the wheels were set in motion but had no correspondence back. I emailed and telephoned them and was told I would get a call back, but they didn't. The clock was ticking as the customer had a deadline. I was surprised by this service. I had to call on a daily basis. It went on for 3 to 4 weeks and no work was done. It was very frustrating. They did turn it around in the end.' (Three Sixty)

'An area of greater concern. We have a dedicated person internally for this area. This is a real issue as disconnections are not happening on time. In particular there are problems if demolishing and rebuilding and it can hold up the development of the whole site. There is regular liaison between us and the manager of that team, and progress is being made but not at the rate they want and thinking of escalating some areas. Generally due to delays we've had to set up a bespoke way of handling this team which has involved effort put in this end. They answer the phone quickly but do not respond to email right away.' (Wave)

'This has been a real challenge area for SW over the last 12 months and there have been consistent failings in their KPI's / SLA's. However, I am aware of changes afoot which should help. In the last 12 months there have been problems that have been taking too long, and there are issues in billing them and specifically challenging the order, therefore allocating responses to long standing issues have been left at the bottom of the pile. Measurements of KPI'S only measure very specific parts of the process so certain elements were missing e.g. time it took to issue a quote' (Business Stream)

'Communication is the worst with this team. Not involved with a lot but when gap sites come into the market it needs SW to do their part. It would be good to know what the issue is. We have to nag SW for updates. Again, there is no escalation process, no responses, no acknowledgement of e-mail. Would be good to know what the issue is. There are issues with systems and processes - SPID issues, Internal IT. We have to follow up to see if there has been a connection in 80% of cases which suggests that there are too many cases for the team to deal with.' (Clear Business)

'The bugbear has and remains to be retail connections. They are not yet on ASCEND and the department is understaffed. It is such a pain, pretty hopeless.. The black and white simple requests work well. Sensible person on the phone...done and dusted! When it's a little shop it doesn't take a month to reply, it can be read in a day. It should revert to SW dealing direct with the customer. NSO's specialist engineers - experts on the network in their local area. Not expecting 24 hour service.' (Commercial Water Solutions)

'End to end process and timescales are not great. There are a lot of process elements with connections and this leads to difficulties with developers. We have seen improvements since 2008 but our guys get frustrated with the timescales and processes. We need more information around new connections. Need better processes. They are sometimes difficult to get hold of or not good at coming back to us.' (Water Plus)

10.6 Market Data

A new team this year, although used by two thirds of LPs in the last 12 months, many don't use the team that often.

Market Data performed on a par with Development Operations, i.e. one of the lowest performing teams. There again appeared to be mixed experiences of the team here.

Whilst the area this team deals with is recognized as being complex, key issues seem to surround communication and timeframes to get things rectified, in particular, with regards to ERRAs.

Third Party References are on the portal which has made tracking queries easier, however, this is not the case with ERRAs and there is still a need to go through the Wholesale Service Desk.

One LP did mention the fact that having a dedicated team appeared to have improved things slightly.

Positives of Market Data	Changes to Market Data
<p>Dedicated team.</p> <p>Expertise and good advice if you get through to the team.</p>	<p>Inability to speak to anyone directly in the team.</p> <p>Doesn't appear to have a set process or, if processes in place, these aren't not clear to LPs.</p> <p>ERRAs still through WSD.</p> <p>Lack of updates.</p> <p>Timeframes to obtain retrospective amendments and also the length of time it takes to backdate these.</p>

Positive Comments from LPs:

'They provide expertise and advice, but their processes are complex in nature. Having a dedicated team has been helpful. The ERRA's are most effective. The quality of response is pretty good. On one project they were particularly good as we were guided through it pretty well.' (Wave)

'Basically, the concept of some of the things we are doing with them I don't like and I don't agree with. However, the actual running the process and getting a response is good. If you do correspond with them they do come back quickly.' (Commercial Water Solutions)

'Third party references which have moved on to the portal and LRV's all work well.' (Clear Business)

'Respond quickly. They have an escalation process which is good.' (Commercial Water Solutions)

'They do take on board issues and seek that information. The LRV do give us excellent online stuff and calculation which are being phased in are shown clearly.' (Water Plus)

'Data provided by SW which caused an issue with a settlement. Issue was sorted in a few days and corrected. Extremely quick response. Don't deal with this team that much.' (Anonymous)

Potential Improvements from LPs:

'I have only used the team a couple of times. The first time we had a dispute over two premises at Glasgow and a meter. Our details were correct and I organised a site visit and I asked SW to update their details. They refused to do it so it's still not right and so we now have 2 meters with the same details. The second incident was sorted.' (Brightwater)

'The main issue is with ERRAs communication and the length of time when it falls to SW to fix an ERRAs, it can be a month turnaround. There are no consistent updates as they submit things in bulk at the end of the month. We have to rely on SW to amend things and there is nothing we can do but sit and wait. It's a cost saving for them to submit monthly, but not us. Billing system relies on getting things fixed. No set process. No one to speak to.' (Clear Business)

'Still make the same errors that they always do. When we can speak to them we can resolve over the phone' (Veolia)

'As third parties we get a lot of information through on a project but not much clarity on information such as timescales and ERRAs reports. When they do address an issue there is more clarity and they do provide it but it would be nice to have this level of information earlier. Third parties want more information and it would be good to have it without having to ask for it.' (Water Plus)

'Amendments can take a long time, mistakes are made and there are more escalations to the account manager for this team. I don't know what the core issue is - internal communication? Backdating of applications is not always passed on. Response comes across quite fragmented and timeframe can be 4-5 months. You can't speak to anyone directly which does not help the situation. The response is poor but not the fault of the WSD's. I can request an amendment, but it takes too long.' (Castle Water)

10.7 Customer Revenue Exemptions and Allowances

A new team this year created by splitting of the Wholesale Billing team, was used by the majority of LPs (73%).

Overall their performance over the last 12 months appeared good, with mean scores achieved around the 5.5 mark across all aspects.

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

Overall, it appears the team is viewed positively.

Positives of Exemptions and Allowances

No issues.
Easy to deal with.
Helpful.

Changes to Exemptions and Allowances

No real negative comments.

Positive Comments from LPs:

'We only have a handful of customers in Scotland, so contact is minimal. Where we have had contact, it has always been good and there are no issues. We have had no problems with the quality of response. They are easy to deal with, although occasionally the forms you have to fill in can be intensive.' (Three Sixty)

'Only deal with them when applying for expansions which is not often. I contacted the Allowances team when there was a leak on one site and they sorted this out. They were helpful and advised what to do and what information to submit and the result was a happy customer.' (Anonymous)

'No real issues. Not much interaction, less than half a dozen. Always fairly straightforward. Response is generally good.' (Pure Utilities)

11. Detailed Perceptions of Low Priority Service Areas

11.1 Service Review Team (SRT)

Similar small numbers of LPs had had contact with this team in 2018 (4 LPs) as in previous years.

From the scores, the Service Review team scores had increased across the board, but this could be due to small sample sizes.

Anecdotally, (spoke to 2 of the 4 LPs about this team in more depth), the comments were reasonable to very good.

Positives of the Service Review Team	Changes to the Service Review Team
Detailed responses and updates. LPs kept in the loop.	No issues mentioned

Positive Comments from LPs:

'This team does what you expect them to do. They let us know when they are reviewing the case which means we can keep the customer informed. Some complaints only take a short time but with the longer ones they call to keep us updated and let you know what they are doing. They manage expectations.' (Castle Water)

'I have only had some contact with this team and the service was 'middle of the road'. It was 'ok' in its performance hence the mediocre scores.' (Business Stream)

Potential Improvements from LPs:

'Nothing really. Would love to get quicker responses but know that this might affect the quality of the response.' (Castle Water)

In terms of escalation process protocol, there were slightly different versions given from the two LPs that it was explored with.

'Contact: Through market process via a form and it is subject to SLA'S. Escalation: If response is within timeframe but we disagree with it and so we are trying to escalate things sooner now and allows resolution of issue quicker. Formal complaint: This is always driven by the customer. Couple of recent complaints when we've done deep dive there have been issues on both sides but we now collaboratively work through these issues.' (Business Stream)

'If you submit a piece of work and don't get a response then this will start the escalation process and might go through 3 or 4 different levels. This can go backwards and forwards during this phase. With a formal complaint you raise a complaint on Form G. This is raised if we are challenging the escalation and the LP and customer are not happy and it needs further investigation. Had all the information about the processes involved.' (Castle Water)

11.2 Standby Services

Used by 5 LPs this year, Standby Services witnessed consistent high scores to previous years. A lack of problems, transparency of processes and communication in the form of updates has always been this teams strength.

Positives of Standby Services	Changes to Standby Services
Prompt action. Proactive updates.	Nothing generally to report.

Positive Comments from LPs:

'Very familiar with people at SW now. Again, no real issues. Close to the processes and procedures' (Business Stream)

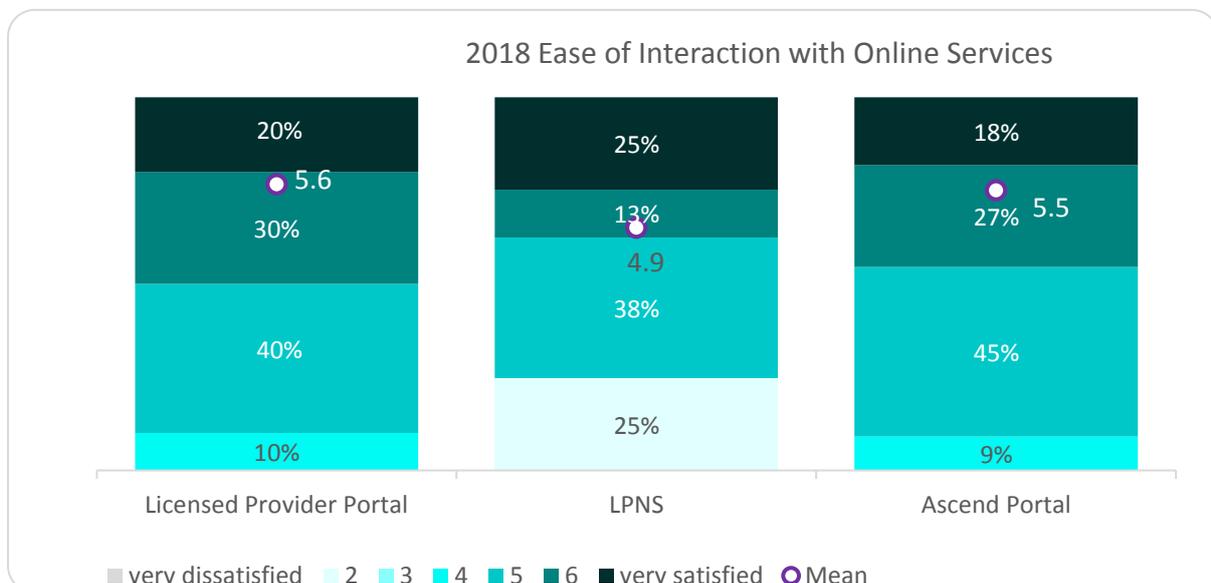
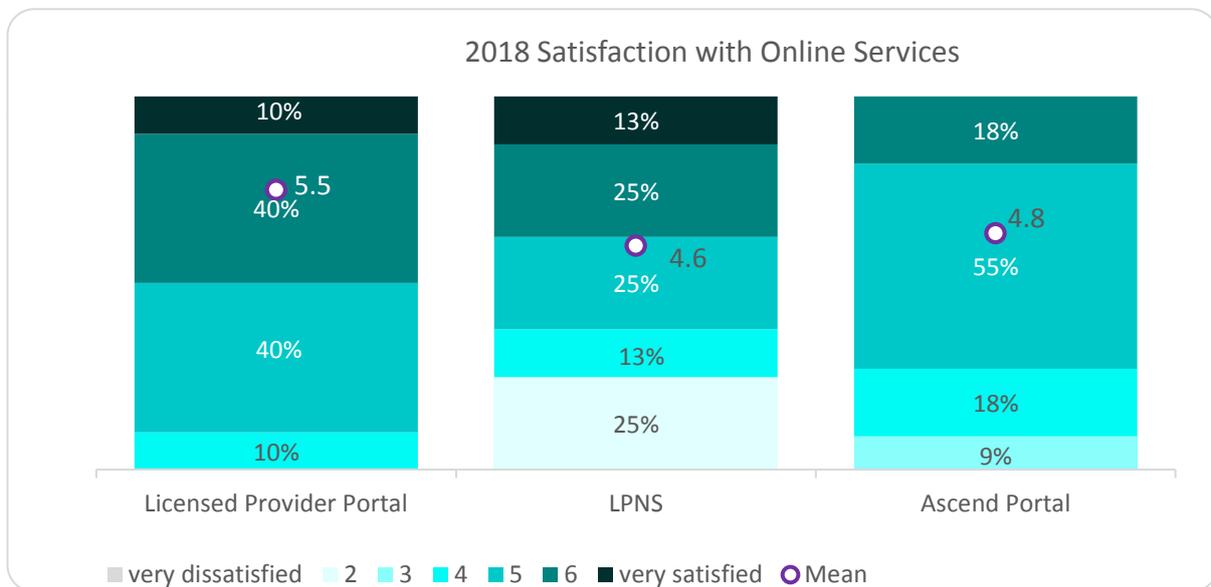
12. Online Service Satisfaction

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

A fifth of LPs in 2018 had not accessed any of the portals (3LPs) in the last 12 months. 73% had used the Ascend Portal (11); 53% (8) the LPNS and 67% (10) the Licensed Provider Portal.

As we have seen previously, satisfaction varies depending upon experiences and how critical individual LPs view the need to access these portals. The LPNS portal once again had the greatest variation in satisfaction levels. However, variation will also be emphasised by the small sub samples at play.

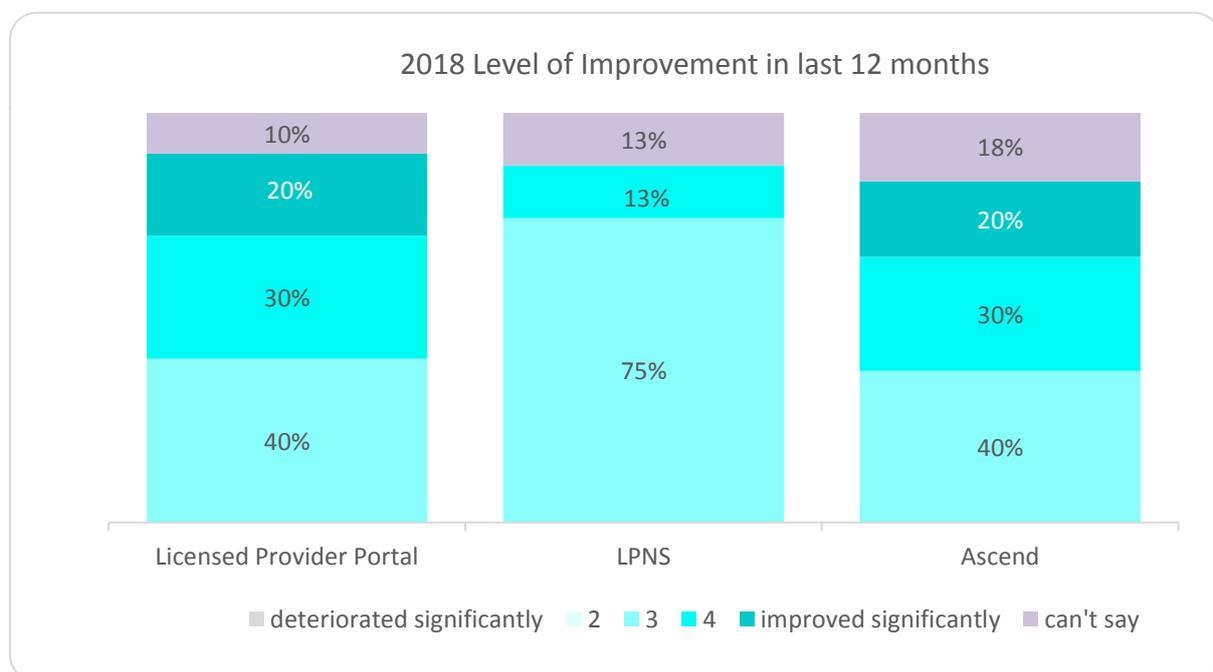
Satisfaction mean scores for both the Licensed Provider portal and LPNS had increased slightly on 2017. There is no direct comparison for the Ascend portal. A similar scenario was evident for ease of interaction. Both the Licensed Provider and Ascend portals scored well, with the LPNS seeing improvement upon last year.



Development and the impact of the Ascend programme are reflected in the improvements noted in the below chart, with both the Licensed Provider and Ascend portals reported as having undergone significant improvement by a few LPs in the last 12 months.

Not surprisingly, the LPNS is largely viewed as having remained the same as previous years.

Anecdotally, there seemed less frustration verbalised at the IT systems overall. In previous years, rating and exploration of the online services seemed to generate a lot of 'groans' from LPs. This year, perhaps one of the subconscious impacts of the Ascend programme has been that although the LPNS has largely been unaffected and therefore open to the same flaws as previous years, the improvements by Ascend have positively rubbed off on this IT system as well? Equally, a couple of LPs also mentioned awareness of this system being updated, which also contributed to a more positive feeling around the LPNS.



12.1 Licensed Provider Portal

Comments from LPs:

'Quite polarised scoring from our guys. Issues with reliability and additional information missing and can't put this on a form, and so they have to submit it separately and often decisions are made without Scottish Water tying together the additional information and the forms. But others gave high scores as easy to use!' (Business Stream)

'Portal issues around challenging. They've not formalised a way of raising a challenge on the portal.' (Brightwater)

'Good, useful information. Not slow. But can be frustrating when trying to complete a form. It is supposed to be quicker and easier, but I sometimes wish we could go back to the old way!' (Clear Business)

'Very easy to use. Any issues we get e-mail updates. Give reference numbers which makes it easy to track. I can see what was submitted and what progress is being made.' (Anonymous)

'All information is there. No issues.' (Water Plus)

12.2 Ascend Portal

Comments from LPs:

'This portal is not as easy to use as some of the English water services use which are more modern and have better interface and are more intuitive. Scottish Water's feels a bit outdated and not easy to navigate. 'Swim pool' is the system used by several wholesalers in England.' (Anonymous)

'When I have made suggestions on the Ascend portal they have been taken on board.' (Wave)

'This is easier to use with quicker and simplified processes. It has good visibility of tracking operational forms.' (Business Stream)

'Easy to navigate' (Clear Business)

'Visibility. Bulk upload. Contact section useful. Forms are similar' (Pure Utilities)

'Can see all the information. Interface is very intuitive. Ascend is better than the other two as it is more user friendly.' (Water 2 Business)

'Case findings are not easy to track. If you raise a case you have to give it a category for example, 'General Enquiry'. But with regards to feedback you don't get notification if Scottish Water have fed back their information, therefore you have to proactively monitor response.' (Three Sixty)

'Gap sites. You don't get a copy of what you've submitted.' (Commercial Water Solutions)

12.3 LPNS

Comments from LPs:

'This service is good and useful as it easy to use.' (Three Sixty)

'Reasonably clunky system at the moment but after the new plans are in place it should be good as it will automate many of the systems. When is it going live?' (Business Stream)

'The information is there and there are no issues. It is not used everyday but it is always updated and we do have a contact if we have problems.' (Water Plus)

'Information is there but difficult to find. It's not user friendly but it is being updated.' (Pure Utilities)

'This system is inadequate and well past it's sell by date. There is much better system in the English market. A lot hinges on wholesalers delivering messages to LP'S. Currently in Scottish Water, we have to go looking. We have developed a process to deal with this, which involves a person doing it and this is costly.' (Wave)

13. Conclusions and Recommendations

In 2018, LPs were again, on the whole, complimentary regarding Scottish Water, and recognise that they are trying to improve their service and work collaboratively with the LPs.

NPS had fallen slightly to -1%, which indicated a small number of detractors outweighed the number of promoters. However, the personal effort score had improved, with over half of LPs (53%) giving a low score of 1 or 2.

Some teams were new to the survey this year, and some had changed names or had been split, therefore direct YOY comparisons was not possible in some cases.

Whilst this year the Gap Sites and Deregistration team had seen some improvement across all metrics, which is encouraging, experiences of this team can be mixed which is frustrating for those who perceive a negative experience. Often more negative experiences come from LPs who have low customer numbers in Scotland and hence feel that because their volume is not high, they might be treated differently – less important.

The lowest performing teams this year were Market Data (a new team) and Development Operations, which has consistently highlighted a need for improvement across the last three years.

The top three teams consistently scoring higher than average satisfaction scores for service, quality of responses and ease of interaction, were the Account Management, Standby Services and Service Review teams, however the latter two teams were only used by a few LPs over the last 12 months.

The Ascend programme appears to be having a positive impact overall, although some teething problems have been evident (as in any new system implemented). The system is largely felt to be easier to navigate, made processes much easier, improved communication between LPs and Scottish Water, given control back to LPs and improved visibility. This may explain the improvement in the personal effort score this year.

In addition, it is often the teams that are not on the portal that are criticised or gain low scores and perceptions. There also seems to have been a halo effect of the new Ascend portal on other portals e.g. the LPNS, although there appears to be awareness of plans afoot to improve this system as well.

Most LPs once again recognise the improvements made by Scottish Water over the last year, but there appears to be inconsistencies in experience of some teams that leads to frustration. In particular if they feel nothing has changed.

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. Thus, if this could be extended across all teams, this would be the ideal.

One area desired is being able to have a direct contact (with telephone number ideally) within a team rather than a general email contact. This is available in some teams, but not others e.g. Metering Services.

The key focus for improvement should continue to be on Gap Sites and Deregistration, Development Operations but also the Market Data team. All have relatively high level of LP interaction and are consistently cited as underperforming, particularly the latter two teams.

Equally, whilst Metering Services has certainly improved across the last three years, there are still improvements that could be made.

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, and improved timeframe for pre-warning of survey site visits.
- **Development Operations:** Communication is still a key issue for this team and the lack of updates is extremely frustrating and costly for LPs. The whole process, particularly new connections, is still deemed far too long and KPI performance is still erratic.
- **Market Data:** Whilst there was comment around a dedicated team being useful, the next year should focus on the timeframe for response to queries / updates and delivery.

2018 survey critique:

- Whilst the change in survey structure worked well and perhaps less time was needed by LPs to complete it, it did reduce the breadth of open ended feedback given because focus in the follow up depth was only given to a maximum of 4 or 5 areas.
- In previous surveys, because the whole questionnaire was given to LPs to complete, and these were returned to us in a large number of instances, we were therefore able to get feedback in areas that weren't necessarily explored within the follow up depth.
- Further discussions on the best way forward are probably needed here to achieve the right balance.