

xserve



Our Customer Initiatives

Version 1.6 - November 2018



Customer **Centric**

Data **Driven**

Change **Leading**

Operationally **Excellent**

People **Powered**

Responsible **Business**



Introduction

After our 2018 Customer Day we received a lot of great feedback and used it as the foundation for our Customer Initiatives. These are those initiatives.

Here, we set out the details for our desired outcome for each initiative, how we are going to get there and how we're going to let you know about our progress.

Exploring the Initiatives

Select the Strategic Pillar you are interested in from the top of a page, each one represents a series of our Customer Initiatives:

- Customer Centric
- Data Driven
- Change Leading
- Operationally Excellent
- People Powered
- Responsible Business

From here, select the individual initiative you want to read more about. You will now see a detailed breakdown of that Customer Initiative, the Xoserve lead, our desired outcome, next steps and any progress updates.

You will also see what Customer input we want to help drive the initiative, as well as how to get in touch with us if you want to get involved.



Customer **Centric**Data **Driven**Change **Leading**Operationally **Excellent**People **Powered**Responsible **Business**

These are all of our initiatives that are aligned to the **Customer Centric** pillar of the Xoserve Strategy House. Click on an initiative to find out more. *Where multiple ticks occur, the tick highlighted with an asterisk indicates the **lead pillar** for that initiative.*

Initiatives	Strategic Pillars					
	Customer Centric	Data Driven	Change Leading	Operationally Excellent	People Powered	Responsible Business
Improve the website to include better navigation for Customer groups	✓*				✓	
Provide contact information in an easy to use format that tells Customers what people do and not just their job title	✓					
Hold Introduction to Xoserve sessions (similar to those used in the electricity market) for new participants and new employees for existing Customers	✓					
Develop a training calendar of events	✓					
Continued rollout of Customer Centric training	✓*				✓	
Monitoring of the issue resolution KVI for all touchpoints across the organisation	✓					
Ensure contact lists are up-to-date so that the right people can be contacted to resolve issues	✓*				✓	
Ensure Business Plan 2019 (BP19) communication and meetings are set in advance to maximise engagement in the process	✓					✓*
Provide papers and documents with sufficient lead times (minimum 5 days) ahead of booked meetings	✓					✓*
Include information highlighting cost controls and key risks to the BP19 plan	✓					✓*
Share last year's BP outputs and an early timeline for those new to the process	✓					✓*



These are all of our initiatives that are aligned to the **Customer Centric** pillar of the Xoserve Strategy House. Click on an initiative to find out more. *Where multiple ticks occur, the tick highlighted with an asterisk indicates the **lead pillar** for that initiative.*

Initiatives	Strategic Pillars					
	Customer Centric	Data Driven	Change Leading	Operationally Excellent	People Powered	Responsible Business
Tailor the role of the Customer Account Managers to ensure we create greater opportunities for this to happen to understand and highlight strategic and tactical requirements	✓					
Additionally we will develop an easy way to share this information and views from all sources more widely within Xoserve to help define operational and service improvements	✓					
Use existing governance meetings to provide monthly updates and share the dates for reviewing and updating the KVI framework	✓					
Feasibility work has already started on some best practices and viable options that will provide a flexible method to allow Customers to provide feedback. We aim to have more details to share in the next 4 / 6 weeks	✓					
Ensure training is developed and delivered from the Customer perspective using a variety of media to ensure materials are available to all market participants from the largest to the smallest	✓					
Organise training for Xoserve personnel to better understand Customer organisation and segments	✓					

Customer **Centric**Data **Driven**Change **Leading**Operationally **Excellent**People **Powered**Responsible **Business**

These are all of our initiatives that are aligned to the **Data Driven** pillar of the Xoserve Strategy House. Click on an initiative to find out more. *Where multiple ticks occur, the tick highlighted with an asterisk indicates the **lead pillar** for that initiative.*

Initiatives	Strategic Pillars					
	Customer Centric	Data Driven	Change Leading	Operationally Excellent	People Powered	Responsible Business
Analysis into enhancements required to our data warehouse to make data easier to access for the development of reports is already underway		✓				
A delivery cycle review is already in progress which is targeting a lean process to increase turnaround of reports and delivery of new data driven change requests		✓				
Design work has started on a new data access platform capability to enable secure download to data / reports generated for them through a data permissions framework		✓				
An access assessment is already underway that will ensure the data permissions Xoserve are involved with are clear and consolidated view readily available		✓				
Engaged with market leading analytics providers to enhance our own generation of analytical insights, with the ultimate aim of extending this capability to our Customer base in the future		✓				
In-line with Customer demand to investigate the quality of market data from a centralised position, a number of investigations will be kicked off tasked with providing the market with data quality insight, using in place governance routes to raise findings		✓				

Customer **Centric**Data **Driven**Change **Leading**Operationally **Excellent**People **Powered**Responsible **Business**

These are all of our initiatives that are aligned to the **Change Leading** pillar of the Xoserve Strategy House. Click on an initiative to find out more. *Where multiple ticks occur, the tick highlighted with an asterisk indicates the **lead pillar** for that initiative.*

Initiatives	Strategic Pillars					
	Customer Centric	Data Driven	Change Leading	Operationally Excellent	People Powered	Responsible Business
Embed the revised E2E change process, introducing the concept of the earlier "Capture" stage to enable industry-wide articulation of change requirements			✓			
Discuss, via existing industry forums, all possible available solution options in an attempt to agree a recommendation 'optimum' solution			✓			
Present high-level costs, delivery effort metrics and likely Customer impacts during the "Capture" stage			✓			
Review change pack creation and circulation process			✓			
Provide visibility of Xoserve Portfolio plan on a pages, including representation of Customer impacts			✓			
Provide likely Customer impact per change via analysis of file format usage per market participant			✓			
Review current provision of change documentation on Xoserve.com			✓			
Review change pack distribution lists			✓			
Assess current format of DSC Delivery Sub-Group meetings to enhance value for all audience members			✓			
Review Xoserve file format documentation library structure/access			✓			
Formulate a change survey focussing on the assessment of Xoserve's ability to delivery change			✓			

Customer **Centric**Data **Driven**Change **Leading**Operationally **Excellent**People **Powered**Responsible **Business**

These are all of our initiatives that are aligned to the **Operationally Excellent** pillar of the Xoserve Strategy House. Click on an initiative to find out more. *Where multiple ticks occur, the tick highlighted with an asterisk indicates the **lead pillar** for that initiative.*

Initiatives	Strategic Pillars					
	Customer Centric	Data Driven	Change Leading	Operationally Excellent	People Powered	Responsible Business
Develop and embed an issue management one touch and right first time culture				✓		
Continuous improvement: Outline how are we using learning and experience since Nexus Go Live (e.g Meter Reads & AQ)				✓		
Continually improve the way we deliver services to our Customer groups				✓		
UiG Resolution				✓		
Improve the timeliness and accuracy of the supporting information for the Amendment Invoice				✓		
Measuring and reporting on the right things				✓		
Implement a new Security Framework				✓		
Embed, refine the new Operational Key Value Indicator Framework				✓		

Customer **Centric**Data **Driven**Change **Leading**Operationally **Excellent**People **Powered**Responsible **Business**

These are all of our initiatives that are aligned to the **People Powered** pillar of the Xoserve Strategy House. Click on an initiative to find out more. *Where multiple ticks occur, the tick highlighted with an asterisk indicates the **lead pillar** for that initiative.*

Initiatives	Strategic Pillars					
	Customer Centric	Data Driven	Change Leading	Operationally Excellent	People Powered	Responsible Business
Design and deliver Customer On-boarding at the right time	✓				✓*	
Design and deliver Customer training through the change cycle			✓		✓*	
Review which processes are causing our Customers pain based on the feedback we've received and work through process improvement plan to address the failings				✓	✓*	

Customer **Centric**Data **Driven**Change **Leading**Operationally **Excellent**People **Powered**Responsible **Business**

These are all of our initiatives that are aligned to the **Responsible Business** pillar of the Xoserve Strategy House.
Click on an initiative to find out more. *Where multiple ticks occur, the tick highlighted with an asterisk indicates the **lead pillar** for that initiative.*

Initiatives	Strategic Pillars					
	Customer Centric	Data Driven	Change Leading	Operationally Excellent	People Powered	Responsible Business
Develop more Customer type specific information showing how different parts of Xoserve activities drive different parts of the cost base and respective charges						✓
Align dates to Customer BP cycles where possible and meaningful						✓
Develop Customer engagement plan that considers digital routes and a range of industry forums to promote wider participation and capture the voice of smaller players						✓
Use feeder meetings to prepare all parties ahead of formal Contract Committees						✓
Provide traceability of changes between plan cycle iterations to demonstrate extent of sensitivities involved						✓
Provide information in Excel format to allow Customers to interrogate and validate						✓
Truly independent reporting lines away from project and internal influence						✓
Develop transparent, simple and regular output to Customer, providing honest information about the health of the projects and programmes ahead of stage gates						✓
Focus resources on priority projects and programmes						✓
Ability to turn to third party assurance support quickly where needed through framework arrangements						✓
Will update the Customer on progress at the June DSC meeting						✓

Customer **Centric**Data **Driven**Change **Leading**Operationally **Excellent**People **Powered**Responsible **Business**

Initiative 1. Improve the website to include better navigation for Customer groups

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Andrew Poolton	Website Improvement	An easy to use website that people choose to use to find information about what we do, change programmes and contacts across the organisation	We have now finalised designs and development has begun for the web build	Customer Panel to provide feedback as further site mock up versions are released If you are not yet involved but would like to be, please contact Andrew or your Customer Advocate	End of November 2018

August update notes:

Work has begun on the pilot interactive home page, looking to be ready for mid-September. Initial static pilot site mock-ups have been established and, using feedback from customers who have nominated themselves to support the development, identifying the most impactful initial release - recognising that to delay improvement to key areas whilst perfecting others is not the best way forward as this will delay the benefits becoming available.

If you would like to be involved in the development process, please contact Andrew, using the link above or your Customer Advocate.

July update notes:

Internal planning has commenced with the creation of a customer engagement strategy and the start of a migration plan.



Initiative 2. Provide contact information in an easy to use format that tells Customers what people do and not just their job title

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Steve Nunnington	Direct Contact Sharing and Maintenance	Customers are able to easily identify and contact the right person	<p>The Expert Day initiative is in the planning and requirement gathering stage. We will be in touch with the industry seeking more information regarding the structure and topic areas. SME surgeries are on hold at the moment as our SMEs are focusing on the key issues such as UIG, AML and release 3.</p> <p>At the Expert Days Customers will be given the opportunity to engage with our SMEs to discuss key industry issues as requested.</p>	We will be hosting an Expert Day on 10th December. Details will be published shortly outlining the subjects that we will be covering and how you can book a place	End of December 2018

September update notes:

Work has been progressing towards a solution to align with Website Improvement work. Please see the Website Improvement Initiative for further details.

Work has been progressed on delivering 'Expert Days' where customers can meet and discuss topics & get involved in Q&A sessions with Subject Matter Experts from Xoserve. The first was delivered in early September. Information on other training/engagement offerings are publicised on the Xoserve website :

<https://www.xoserve.com/index.php/our-services/education-and-resources/>



Initiative 3. Hold Introduction to Xoserve sessions (similar to those used in the electricity market) for new participants and new employees for existing Customers

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Tahera Choudhury	'Introduction to Xoserve' Training Sessions	A rolling programme of events that allows new entrants or new colleagues to understand the basics of the services we provide	We have undertaken requirements gathering calls with customers to understand what topics and areas would be of benefit and the level the information is pitched at Material storyboards are currently being created	Customer nominees to participate in pilot session and provide feedback nearer to the point of pilot in Q4 2018	End of November 2018



Initiative 4. Develop a training calendar of events

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Tahera Choudhury	Publish and Maintain Training Event Calendar	Training programme published enabling users to find and book events easily	NA - Training Calendar has been published and is being maintained	Training requests can be made via Tahera Choudhury or your Customer Advocate	N/A

July update notes:

A training event calendar (Customer Training Plan) has been published on Xoserve.com <https://www.xoserve.com/index.php/our-services/education-and-resources/> following input from the Contract Management Committee in June.

The calendar will be updated as more events are organised.

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Initiative 5. Continued rollout of Customer Centric training

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Darren Jackson	Customer Centricity Training	Xoserve staff think 'outside in', delivering a consistently right-first-time service.	<p>The new coaching sessions launched in August are now embedding, and the first three habits each group will focus on will be those identified by our customers as being those habits that, if improved, would transform their customer experience</p> <p>This will happen in the sessions that will take place through November, December and January</p>	To provide feedback on whether the experience is changing via your Customer Advocates	End of October 2018

August update notes:

The first of three phases of Complaint Handling Training has completed with excellent staff feedback and participation. Further phases will roll out over 2018 and into early 2019.



Initiative 6. Monitoring of the issue resolution KVI for all touchpoints across the organisation

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Michele Downes	Monitoring Key Value Indicator for Issue Resolution	Change behaviours within Xoserve to ensure we exceed Customers expectations and improve the experience	Proposed updates to KVIs presented to CoMC, further updates requested by members	Customers to feedback via Customer Account Managers or CoMC when expectations are not met	End of December 2018

August update notes:

KVI monitoring has been established and is ongoing. Iterative enhancements have been made to the dashboards following customer feedback.

June update notes:

Monitoring Key Value Indicator for Issue Resolution

The KVIs for May have been published for CoMC on 20th June. Three KVIs reported and all have met the target:

- Issue Resolution: Target 90%, Achieved 90.7%
- Service Delivery: Target 98%, Achieved 98%
- Customer Data Security: Target 0 High/Critical, no more than 1 Medium and no more than 5 Low. Achieved 2 categorised as Low incidents

Some changes agreed at CoMC to the June dashboard.

With respect to 'Issue Resolution' KVI, some customers have noticed a difference in the quality of the response & timeliness. However, some areas of Xoserve still require improvements.



Initiative 8. Ensure Business Plan 2019 (BP19) communication and meetings are set in advance to maximise engagement in the process

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Dave Turpin	BP19 - Early communication and engagement planning, considering Customer Business Plan cycles	A community approach to BP19 where all parties are aware and feel their opinions are heard and valued	N/A	Continue to provide feedback throughout BP19 process	N/A

July update notes:

Action complete - Approach and Principles document containing the engagement strategy has been approved by stakeholders.

June update notes:

Business Plan Development Proposal Published on 13th June, Discussed at June Contract Management Committee, Followed up by a WebEx on 22nd June to support the Launch. Feedback was requested by 27th June.

For the above document and further information click [here](#)

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Initiative 9. Provide Business Plan 2019 (BP19) papers and documents with sufficient lead times (minimum 5 days) ahead of booked meetings

*The principle of sharing documentation in advance of meetings has been baked into the BP19 process and engagement plan.
No further update is anticipated for this specific action, but compliance will be monitored as part of the BP19 engagement.*

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Imran Sangra	BP19 - Fair timescale document publication	Attendees are able to contribute effectively at meetings, having had a reasonable amount of time to digest content	N/A	No specific input to complete this action. Ongoing feedback is welcomed at the point of delivery or via your Customer Advocate.	N/A

June update notes:

Business Plan Development Proposal Published on 13th June, Discussed at June Contract Management Committee, Followed up by a WebEx on 22nd June to support the Launch. Feedback was requested by 27th June.

For the above document and further information click [here](#)



Initiative 10. Include information highlighting cost controls and key risks to the Business Plan 2019 (BP19) plan

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Imran Sangra	BP19 - Key risk and cost control information	Cost classifications and assumptions are clear and Customer specific risks and benefits issued	Formal consultation responses to be factored into the second draft BP19 document for end of November, with cost updates, release of FTE numbers, RIIO charging impacts, CPI index cost flexing and charge statement views created	Review BP19 outputs and feedback on how the information is presented	End of November 2018

September update notes:

Customer class pack has been developed giving constituent level detail. Also includes 'uncertainty fan' and discussion on risk allowance. The document will be shared following the BP19 draft plan submission and in line with agreed engagement plan

June update notes:

Business Plan Development Proposal Published on 13th June, Discussed at June Contract Management Committee, Followed up by a WebEx on 22nd June to support the Launch. Feedback was requested by 27th June.

For the above document and further information click [here](#)



Initiative 11. Share last year's Business Plan outputs and an early timeline for those new to the process

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Dave Turpin	BP19 - Share BP18 outcomes	BP18 outcomes shared alongside a plan of BP19s activities	No further action - BP18 was re-circulated as per the BP19 plan	No further action	N/A - Actions Complete

July update notes:

Action Complete - Initial timeline shared at Customer Day and May Contract Meeting. Detailed plan and principles shared at the June Contract Committee. BP18 was re-circulated within week commencing 25th May.



Initiative 12. Analysis into enhancements required to our data warehouse to make data easier to access for the development of reports is already underway

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Data Driven	Steve Concannon	Enriched Data warehouse - proactively adding data items that are anticipated to be valuable to the industry	Increased data available in data warehouse and reduce time for production of reports	Confirm funding, resource allocation and create delivery plan for the delivery phase. Funding aspects are aligned to the progress with BP19 approval.	No specific input is requested at this phase, however any feedback you have is welcome via your Customer Advocate	End of January 2019

September update notes:

First phase of BW Accelerator project was completed which delivered a gap analysis. Planning for the second phase is in progress, with alignment to BP19 for funding and resource allocation.



Initiative 13. A delivery cycle review is already in progress which is targeting a lean process to increase turnaround of reports and delivery of new data driven change requests

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Data Driven	Steve Concannon	Efficient report creation process - removing unnecessary governance to speed up delivery	Quicker turnaround of simple reporting requests. Agile delivery of data promoting product prototyping and evaluation with Customers	Agreements with our internal PMO team surrounding the project documentation for simple report changes has been agreed and is in place. Standard IS Ops implementation processes are followed to productionise reports with agreed fit for purpose checks in place to provide assurance yet lean in nature of its delivery	Please feedback as you use the process either at the point of delivery or via your Customer Advocate	N/A

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Initiative 14. Design work has started on a new data access platform capability to enable secure download to data / reports generated for them through a data permissions framework

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Data Driven	Steve Concannon	Creating better ways to share data	Easy online Customer access to Xoserve held data sets Xoserve tooling available across the industry	Continue work on Data Platform architecture plan	Contribution to, and adoption of, Xoserve tooling to data access, expected Summer 2019	End of January 2019

September update notes:

Data Access Platform definition and strategy has been completed. This encompasses many of the Data Driven pillar initiatives as part of one coordinated approach. Work is now progressing to define lower level architectural details. Further updates will be aligned to the outcome of BP19 (Business Plan) process.



Initiative 15. An access assessment is already underway that will ensure the data permissions Xoserve are involved with are clear and consolidated view readily available

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Data Driven	Steve Concannon	Create clear documentation describing data permissions that can be referenced easily	Catalogue of available data, technical instructions on how to access, and which governance channels to follow for usage	Customer team are leading on the industry agreement to a proposed data permissions matrix. Approval targeted Q1 2019 Xoserve's Data Office will then ensure alignment to this matrix in deliverables moving forward including its publication	Xoserve requires support to generate appropriate permissions	End of January 2019



Initiative 16. Engaged with market leading analytics providers to enhance our own generation of analytical insights, with the ultimate aim of extending this capability to our Customer base in the future

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Data Driven	Steve Concannon	Modernising Xoserve's analytical capabilities to improve provision of proactive data insights	Analytical capabilities embedded in Xoserve to support advanced analytics to solve critical industry issues	Take learnings from the progress in UIG analytics space and feed into the requirements for wider analytical capabilities	Help with key use case identification and possible additional funding	End of February 2019

September update notes:

As with other elements of the Data Driven pillar initiatives, this action item forms part of the overall Data Access Platform approach. Early progress on this particular topic will be in the space of UIG, from which we will learn and feed into the requirements for the Analytical capabilities within the Data Access Platform

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Initiative 17. In-line with Customer demand to investigate the quality of market data from a centralised position, a number of investigations will be kicked off tasked with providing the market with data quality insight, using in place governance routes to raise findings

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Data Driven	Steve Concannon	Supporting industry process evaluation through data quality analysis	Better quality data throughout the industry, and identification of processes that cause data inconsistencies	Data quality framework generation Data quality assessment Issue identification	Insight sought upon what data quality issues provide Customers with most pain / cost. This can be fed back through your Customer Advocate. As specific initiatives are identified, engagement plans will be adapted to suit the initiative	End of February 2019

September update notes:

Many of the data related initiatives are being tackled as part of a more joined up strategy for Data and the Data Platform. Capability to perform proactive data quality analysis forms part of this Data Platform strategy but is a medium term enhancement.



Initiative 18. Embed the revised E2E change process, introducing the concept of the earlier "Capture" stage to enable industry-wide articulation of change requirements

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Alex Stuart	Embedding the improved change process	Far greater Customer involvement throughout all stages of the change delivery lifecycle to enable the delivery of change on time, to budget, and with the optimum solution delivered for the industry	In-flight (Now until Dec 2018)	Ongoing feedback to change team to drive refinements via DSG or your Customer Advocate	N/A

July update notes:

Revised Change process shared and discussed at the Customer Event and DSC Change Committee; this has been embedded into ongoing and new change. No specific further updates for this action are expected here. Feedback for continual improvement is now sought via Change Committee or your Customer Advocate.



Initiative 19. Discuss, via existing industry forums, all possible available solution options in an attempt to agree a recommendation 'optimum' solution

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Emma Smith	Giving our Customer options on change solutions	Wider Customer groups are fully aware of change solution options and have a mechanism to provide their preferences	In-flight - already started at Data Services Contract Delivery Sub Group (DSC DSG)	Ongoing feedback to change team to drive refinements via fortnightly DSG or direct contact	N/A

August update notes:

This is now embedded activity. No further updates will be made to this page. For any feedback on Change Material, please raise it at DSG or via your Customer Advocate.



Initiative 20. Present high-level costs, delivery effort metrics and likely Customer impacts during the "Capture" stage

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Emma Smith	Provide early change-impact assessment	Customers have a rounded view of impacts and costs at an early stage of change lifecycle so that a firm decision to progress change can be made	N/A	No specific input requirements to complete this action. Feedback to support ongoing improvement can be made at the point of delivery or via your Customer Advocate	N/A

June update notes:

New process has been embedded. This has become part of the change lifecycle capture process - Action Complete.

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Initiative 21. Review change pack creation and circulation process

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Ellie Rogers	Change Pack content and distribution improvements	Change pack is more meaningful and draws out the impacts to the Customer	<p>The Change Pack contents and distribution improvements have been discussed with the industry. The Change Pack template has been updated with the intention to make it more 'fit for purpose'</p> <p>Ongoing feedback is requested via the DSC Delivery Sub-Group. The improvements to the Change Pack distribution are expected to be incorporated into the new website</p>	Refine inputs and agree on preferences in order to move towards consensus	Ongoing via DSG

July update notes:

Initial feedback received but no consensus reached, hence additional work will be required with Stakeholders via DSG

June update notes:

There are two elements to this work:

1. Creation of a new pack format - approved and in place (Action Completed but please provide feedback for any additional improvements on an ongoing basis)
2. Changes to the method of circulation.

Initial discussion as an Agenda Item at DSG on 18th June and an action placed on DSG members to request they tell us how they would like to receive the packs.



Initiative 22. Provide visibility of Xoserve Portfolio plan on a pages, including representation of Customer impacts

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Linda Whitcroft	Share enhanced portfolio change plans	Real-time external visibility of all Xoserve change deliveries, with clear articulation of information required by our Customers	<p>Continue to share change congestion POAP to supplement the individual platform POAPs on a 3 monthly basis with the DSC Change Management Committee.</p> <p>The longer term solution will be delivered by the implementation of a central PPM solution.</p>	Ongoing feedback to change team to drive refinements	End of January 2019

August update notes:

The congestion POAP is being shared at DSC Change Management Committee on a 3 monthly basis, materials submitted to DSC Change Management Committee are available on the Joint Office Website.

June update notes:

UK Link and Gemini POAPs are being shared monthly at Change Management Committee meetings, for which the materials are available on the Joint Office Website:

A POAP to display the 'change congestion' is currently being developed

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Initiative 23. Provide likely Customer impact per change via analysis of file format usage per market participant

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Paul Orsler	Provide tailored impacts by process usage	Full Customer engagement and action	Xoserve IS Application teams have confirmed Management Information is available, however this isn't currently collated and reported on a scheduled basis Looking to develop this further	Customer Engagement with Xoserve where specific Customer impacts are identified	End of November 2018

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Initiative 24. Review current provision of change documentation on Xoserve.com

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Emma Smith	Review existing published change documentation	Easy to find and clear information that is relevant for Customers	<p>We will shortly be publishing the new Simplified Change Register, we have made some amendments to the data available following customer feedback. The Release circular is now also published on Xoserve.com which will be rolled out for each Release including Minor Releases</p> <p>The Change Proposal template continues to be a success however we are always looking for ways to improve the content of the documentation. We are looking for enhanced ways to store change documentation as part of the new Xoserve website</p>	Ongoing feedback to change team to drive refinements	End of November 2018

July update notes:

This action is linked to the work on Website Development (Initiative 1) - please refer for further progress information



Initiative 25. Review change pack distribution lists

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Mike Orsler	Change Pack content and distribution improvements	Change packs are made available to the right people within our Customer organisations in a user friendly and accessible way	Action complete - distribution list improvements will be made by the Customer Life Cycle team through the Customer Communications Recommendation	Identification to change team of who the right contacts are within Customer organisations	N/A

June update notes:

An annual review of distribution list subscribers has been completed.

Work will now commence on breaking the distribution lists down into sub-groups; for example "DSG", "Change Pack", etc.

This is expected to be completed by September.



Initiative 26. Assess current format of Data Services Contract (DSC) Delivery Sub-Group meetings to enhance value for all audience members

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Emma Smith	Ensure DSG meetings are effective for all participants	DSG members actively participate in a valuable discussion in order to assess and progress change	N/A - Action Complete	Attendance at DSG and candid feedback, either directly at DSG or via Customer Advocate	N/A

July update notes:

Continuous improvement is now a standing agenda item at DSG.



Initiative 27. Review Xoserve file format documentation library structure/access

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	David Addison	Review the Xoserve File Format Library to enhance structure, accessibility and content	Users easily locate accurate and meaningful content to assist with file creation and system design	We are currently reviewing domain standards and continuing to discuss options with Service Providers	General feedback welcomed via your Customer Advocate	End of November 2018

July update notes:

A product assessment has been initiated; we are talking to service providers about presentation standards and options. Initial findings will be gathered and views solicited at DSG in September.



Initiative 28. Formulate a Change Survey focussing on the assessment of Xoserve's ability to deliver change

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Linda Whitcroft	Gather and listen to feedback on the change delivery experience	Strive towards change leading vision	N/A Action complete	Ongoing feedback to the Change Team uklink@xoserve.com	N/A

July update notes:

Action complete - The first change survey was issued to customers on 13th July with responses to have been received by the end of July. Surveys will continue to be issued to the agreed timetable as part of ongoing continual improvement.



Initiative 29. Tailor the role of the Customer Account Managers to ensure we create greater opportunities for this to happen to understand and highlight strategic and tactical requirements

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Dave Turpin	Enhancing the strategic scope of Customer contact	An embedded Customer Advocate team that understands the strategic requirements of our Customers and is able to bring that to life within Xoserve	Customer Advocate structure completed and shared across Xoserve Next step is to publicise this via xoserve.com by the end of November	Feedback through Institute of Customer Service (ICS) Survey and Customer Advocates	End of November 2018



Initiative 31. Use existing governance meetings to provide monthly updates and share the dates for reviewing and updating the KVI framework

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Michele Downes	Regular, efficient communication and review of Key Value Indicators (KVI) framework progress	Robust monitoring and reporting of all relevant interactions across the business	Following implementation in May, move forward with continual review and refinement	Feedback on effectiveness of KVIs and framework	N/A

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Initiative 33. Design and deliver customer on-boarding at the right time

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Tahera Choudhury	Customer onboarding experience improvement	Easy entry to the gas market with accessible information and processes	N/A	Feedback during the onboarding process as part of continual feedback	N/A

July update notes:

The onboarding process has been reviewed considering customer feedback. Many user experience improvements have been identified. The user experience improvements have been implemented immediately.

June update notes:

This initiative is included on the customer training plan. The requirement gathering began week commencing 25th June 18. Once the requirements are identified, an action plan will be created and customers will be asked to review and feed into the action plan.



Initiative 34. Design and deliver Customer training through the change cycle

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Change Leading	Gavin Statham	Design and deliver Customer training throughout the change lifecycle	Customers are supported throughout the change process by timely and appropriate training provision	NA - This has become an embedded part of the change lifecycle with training for Release 2 (Jun 18) and Release 3 (November 18) delivered.	Engage in training activities and provide feedback to drive continual improvement either at the point of delivery, via DSG or your Customer Advocate	N/A

September update notes:

R3 plan delivered through DSG in July and the training completed in early September. This has become an established part of the change delivery lifecycle and hence no further updates will be made to this action. For details of future training provision please see:

<https://www.xoserve.com/index.php/our-services/education-and-resources/>

June update notes:

UKL June '18 Release (R2) training plan has been published. Work is under way to develop a UKL November '18 Release (R3) training plan. This ownership of this work has been passed to Gavin Statham.

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Initiative 35. Review which processes are causing our Customers pain based on the feedback we've received and work through process improvement plan to address the failings

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	Listen to feedback received in order to prioritise and plan process improvements	Priority is understood and the most important issues are worked on first	Develop a detailed action plan	A detailed action plan will be shared. Identification of key issues and priorities can be shared via Customer Advocates	End of December 2018



Initiative 36. Develop more Customer type specific information showing how different parts of Xoserve activities drive different parts of the cost base and respective charges

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Imran Sangra	Share more information to help clarify the derivation of Customer charges	Increased transparency on charges and how they have been derived	Customise our Customer class packs with initiatives, risks and benefits contained Explore: <ul style="list-style-type: none">- Build tableau DB that can be interrogated- Provide charge method high level calculator for Customer use	Feedback welcomed via Customer Advocates	N/A

June update notes:

Action complete - No further updates will be added to this page.

The proposals for customer class packs were presented at the 20/6 CoMC. These were welcomed as an improvement on information presented as part of previous plan processes. No additional comments were received at the meeting.

We welcome feedback throughout the BP19 process for any further development.



Initiative 38. Develop Customer engagement plan that considers digital routes and a range of industry forums to promote wider participation and capture the voice of smaller players

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Dave Turpin	Business Plan 2019 (BP19) - Engagement Strategy	A widely informed cross-section of all Data Services Contract (DSC) Customers with opportunity to input to BP19 without the requirement to attend all meetings	N/A	Ongoing feedback through the BP19 process	N/A

July update notes:

Action complete - The approach and principles document containing the engagement strategy has been approved with a far broader range of engagement included.

June update notes:

Business Plan Development Proposal Published on 13th June. Discussed at June Contract Management Committee, followed up by a WebEx on 22nd June to support the Launch. Feedback was requested by 27th June.

For the above document and further information click [here](#)



Initiative 40. Provide traceability of changes between plan cycle iterations to demonstrate extent of sensitivities involved

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Imran Sangra	Business Plan 2019 (BP19) - Share details of changes made in order to enable traceability between cycles	Provide bridges explaining movements from one option to next and year-on-year	Build this into outputs pack for Customer. High level model may allow Customer to run their own sensitivity analysis Action closed - compliance is monitored through the BP19 engagement plan	Feedback will be actively sought during the BP19 process	N/A

September update notes:

For certain projects like UiG and CSS and RAASP, which are customer specific, we will outline the sensitivity range.

We aim to share a total charges model with customers at 2nd consultation and to produce bridges on movements between key versions shared with customers as they develop through consultation phase.



Initiative 41. Provide information in Excel format to allow Customers to interrogate and validate

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Imran Sangra	Business Plan 2019 (BP19) - Share data in a more consumable format that can be better interrogated	Excel data tables made available for Customer onward formatting	Share Excel Output Tables Action complete - compliance is monitored throughout the BP19 engagement plan	Your feedback is actively sought throughout the BP19 process	N/A

September update notes:

Excel output tables are being established which will be provided during the formal consultation phase, by the start of October.



Initiative 42. Truly independent reporting lines away from project and internal influence

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Responsible Business	Jane Rocky	Establish a Change Assurance Function	We operate a robust Change Assurance Function that delivers the principles of independence, proportionality, proactivity and value add	N/A - Action complete	No specific input requested to support this action. Feedback to support continual process improvement is welcomed either at the point of delivery or via your Customer Advocate	N/A

June update notes:

Change Assurance Function has been established and this will progress as agreed. Ongoing monthly provisions of Change Assurance POAP and Dashboard at ChMC and quarterly attendance of the Head of Change Assurance at ChMC.

This action is complete and has moved into a business-as-usual activity.

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Initiative 47. Develop and embed an issue management one touch and right first time culture

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	One touch, right first time issue management culture across Xoserve	All staff across Xoserve take ownership of any interaction, request or issue and deal with them in a consistent manner with a focus on ensuring the Customer is kept informed of progress	Identify requirements and develop training plan	Customer Advocates will be incorporating a sense check as part of their strategy and operational meetings. Your ongoing feedback will help us meet your expectations.	End of January 2019



Initiative 48. Continuous improvement: Outline how are we using learning and experience since Nexus Go Live (e.g Meter Reads & AQ)

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	Demonstrable Continuous Improvement	Create an opportunity to establish if there are common areas of concerns and how we can collectively improve service since Nexus Go Live	Agree further topics	Highlight topics you would like to discuss and do a deep dive on via Customer Account Managers	End of January 2019

September update notes:

Lessons learned from Nexus implementation have been fed into the preparation for and implementation of subsequent UKLP releases. Many of which have been seen and are listed within this document as specific commitments - such as industry training on change.

July update notes:

A webpage related to UiG has been established and should be consulted for up-to-date UiG information.

See [xoserve.com](https://www.xoserve.com) > Communications > Issue Management > Unidentified Gas (UiG)

<https://www.xoserve.com/index.php/unidentified-gas-uig/>



Initiative 49. Continually improve the way we deliver services to our Customer groups

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	Demonstrable Continuous Improvement	To have a robust framework to cyclically review processes and services in line with Customers ongoing and changing needs	Continue to use feedback from all interactions and more recently via Rant and Rave to understand which services are pain points for our customers Continue to develop service improvements	Identification of key areas of focus via Customer Advocates	29th March 2019

October update notes:

We have started to look at process automation in areas to improve the accuracy of data and eliminate the risk of data breaches.



Initiative 50. UiG Resolution

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	UiG Resolution	Understand and explain the factors which lead to UiG volatility and what correctives actions each Customer groups can take to reduce the levels..	Please see dedicated UiG webpage: https://www.xoserve.com/index.php/unidentified-gas-uig/	Continued engagement with industry processes and Xoserve to investigate UiG	N/A

July update notes:

A webpage related to UiG has been established and should be consulted for up-to-date UiG information.

See xoserve.com > Communications > Issue Management > Unidentified Gas (UiG)

<https://www.xoserve.com/index.php/unidentified-gas-uig/>



Initiative 51. Improve the timeliness and accuracy of the supporting information for the Amendment Invoice

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Michele Downes	Amendment Invoice Supporting Information Improvements	Resolve the current set of known issues and define an action plan to provide accurate and timely supporting information that will allow all Customers to validate the Amendment invoice	Detail on the ongoing management of this issue are available at a dedicated web page: https://www.xoserve.com/index.php/amendment-invoice/	Please continue to engage with Michele Downes	N/A

September update notes:

Defect fixes which will correct 40% of the issues seen were implemented at the end of August, work continues to create fixes for the remaining items.

A dedicated location on Xoserve.com has been established to capture more frequent updates and information. As such no interim updates will be made to this Customer Initiative page - please instead navigate to: <https://www.xoserve.com/index.php/amendment-invoice/>

July update notes:

High level plan published.

June update notes:

WebEx held on 11th June; the materials presented are available [here](#)

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Initiative 52. Measuring and reporting on the right things

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	Measuring & Reporting on the right things	Customers trust and are provided with valuable and relevant insights through the content of reported metrics	Re-prioritised to Q1 - 2019	Identification of key areas of focus via your Customer Advocates	29th March 2019



Initiative 53. Implement a new Security Framework

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	Implement a new Security Framework	Provision of secure and reliable services that protect the Industry assets we manage	N/A	Further input via the Contract Management Committee where appropriate	N/A

September update notes:

Interim Chief Information Security Officer (CISO) has been recruited to scope the Security Change Programme. An update was given to CoMC in August and agreed that any appropriate updates in the future would be shared through that committee.



Initiative 54. Embed, refine the new Operational Key Value Indicator Framework

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Operationally Excellent	Sat Kalsi	KVI Framework Implementation	All Customer groups are fully aware of the new KVI Framework and it is easy to support, operate and provide feedback	<p>We have started the review of the framework as planned. We aim to have an updated version for implementation in May 2019</p> <p>We will use the existing governance meetings to review and approve the revised KVIs</p>	<p>Please provide feedback on the process and let us know if you'd like any additional information to support the communications - to increase the awareness within your organisation.</p> <p>Contact us either at the point of delivery or via your Customer Advocate</p>	End of April 2019

September update notes:

KVI framework working well. New feedback mechanism, Rant & Rave has been rolled out to gather customer feedback and insights. A review of the framework is scheduled in October.

June update notes:

Information about the KVI Framework and process has been shared at Contract Management Committee and within Shipper briefing packs in June. More information is available [here](#). Monitoring and Metric Gathering is now an ongoing process. A formal review of the process and progress in October 2018, but feedback is always welcomed via the point of distribution, or your Customer Advocate.

The KVIs for May have been published for CoMC on 20th June. Three KVIs reported and all have met the target:

- Issue Resolution : Target 90%, Achieved 90.7% - Service Delivery : Target 98%, Achieved 98% - Customer Data Security: Target 0 High/Critical, no more than 1Medium & no more than 5 Low. Achieved 2 categorised as Low incidents.

Some changes were agreed at CoMC to the June dashboard which will be worked on.



Initiative 55. Ensure training is developed and delivered from the Customer perspective using a variety of media to ensure materials are available to all market participants from the largest to the smallest

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Tahera Choudhury	Training developed with accessibility, engagement and Customer focus in mind	Training we provide is developed and delivered with the Customer perspective in mind and using methods and materials to ensure it is easily accessible to all parties	N/A - Action complete	Feedback for continual improvement to be directed to your Customer Advocate	N/A

July update notes:

This action has been wrapped into each individual training initiative and is now part of our approach to training requirements specification. No further updates will be made to this page but feedback is always welcomed.

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Initiative 56. Organise training for Xoserve personnel to better understand Customer organisation and segments

Pillar	Lead	Title	Outcome	Plan / Action / Next Steps	Customer Input	Next update
Customer Centric	Tahera Choudhury	Xoserve Customer segment awareness training	Xoserve staff are aware of and sensitive to the differences between organisations in Customer segments and able to adapt their service and approach accordingly	Define detailed agenda and format for the first session Awaiting potential feasible delivery timescales	Support from market segments to help develop the topics and content for the training	End of November 2018

July update notes:

Training plan has been developed and is available on xoserve.com - Navigate to Our Services > Education & Resources > Customer Training Plan

The first customer segment discovery day for Gas Distribution Networks is set for November 2018.