16.1 – Please confirm that the bidding entity has experience of delivering a meter reading contract or similar activity to a similar size and scale to the Yorkshire Water region? Please confirm what these activities are. (**3000 characters, excel document response. Additional attachments optional**).

Morrison Data Services - The UKs leading meter reading agent in the energy and water sector

Yorkshire Water will benefit from the largest and most capable resources in the data collection sector, providing accurate billing of your customers and a reduced cost to serve over the lifetime of the contract. With our wealth of experience in data collection activities in both the water and energy sectors, we are the only household outsourced water meter reading provider, undertaking c.9m readings for Thames Water, Southern Water, South East Water and Affinity Water. We provide services to over 90% of the UK energy market. This makes us the leading meter reader in the UK. Our national workforce of 2,200 meter readers delivers an estimated 53m visits annually on a scale unmatched in the industry. Using proven systems, including Temetra, more than 99% of meter readings are recorded accurately, stored, and transferred to our clients by a secure and flexible IT infrastructure. Overseeing the IT and field operations are a variety of dedicated teams including operations centre, field management, training and compliance and contract managers based in Newcastle and Oldham, giving resilience to our field workforce.

Increasing the longevity and efficiencies in meter reading

Operating as a meter reading agent in energy and water, we understand the challenges presented by both markets and we can indefinity opportunities for efficiency creation. We have been working on the implementation of One Data Collection (1DC) - this initiative brings together the data collection activities of both water and energy under one workforce and aligned systems, traditionally completed by two separate teams. 1DC creates efficiency savings, reduces carbon emissions, increases productivity, and increases the wellbeing of our staff. 1DC prolongs meter reading activity and mitigates increases in delivery costs as meter reading portfolios decrease.

Thames Water

We deliver meter reading and sales investigation activities for Thames Water across their entire region, spanning 13,000km^2, including Central London. The region is of a comparable size to the Yorkshire region (15,000km^2). Our meter reading activities include cyclical meter reading for accurate billing, off cycle work, and sales investigation work to support customers with billing enquiries.There are 1.5m meter points to manage on the contract. 81% are visually read, with 19% being automated meter reads. We deliver 2.8m – 3m meter reads and c.30k sales investigations annually.The area geography is comparable to the Yorkshire Water region with a mix of rural areas in Gloucestershire and Wiltshire through to highly urbanised areas, including Central London. We use a mix of teams with different areas of focus to get the best results where geography is mixed in this way. In Central London, we use walk-based teams for high volume meter reading, with separate driving-based teams that manage more complex, lower volume reading.

2996/3000 characters

16.2 - Please provide relevant recent example of a meter reading service SLA compliance. Describe the systems, people and process that were used in order to deliver these SLA. Detail how theses SLAs and KPIs were achieved. (**no limits, attachments allowed).**

Industry leaders in water data collection performance

As we operate 100% of the outsourced household water data collection market and are the largest non-household service provider in England and Scotland, we have a deep understanding of what the industry needs and deploy industry best-practice to meet these requirements.

This includes the development and meeting of key meter reading metrics, two core SLAs that support all our clients meet their customer and regulatory obligations are:

1. Percentage of visits made
2. Percentage of successful reads

Whilst these are the core SLAs, we have a variety of other SLAs that meet specific needs of the industry and are flexible to the needs of our clients. We would work with you to develop any business specific SLAs or KPIs you required, drawing on best practice to ensure these are achievable.

Below details how we comply with the SLAs for the Southern Water contract, and how we deploy systems and people to deliver high-quality services.

SLA compliance on our Southern Water contract

Please find attached with this response our September 2023 performance report from our Southern Water contract (***Appendix 16.2***). The key KPIs from this report include:

- 100% compliance with the cyclical programme of work outside of an unavoidable weather event in December 2022.
- A consistently low skip trend of between 7-9%, even with an increase in manual readings.
- Above 99% compliance on all appointments and off-cycle visits.
- 100% compliance on customer move requests.

Southern Water has seen excellent improvement in customer outcomes since outsourcing to us. In the first year of delivery for Southern Water, we have delivered 100% compliance on all KPIs, decreased the number of check reads by 64%, reduced skips by 50% for non-household customers, reduced costs, and improved the time to resolve meter to cash billing enquiries.

Systems

The Temetra system underpins all our water meter reading activities, from initial planning and scheduling through to in-field meter reading and performance reporting. As the pioneers of the Temetra system in the UK water data collection market, we have an established relationship with Temetra and have worked with them for years to further develop and tailor the system to the meter reading requirements of our customers.

Added value: We have worked with Temetra to develop “Project Levi” which enhances the capabilities of the system to bring further efficiency to our delivery model. Our 100% share of the water data collection market means we are best placed to continue collaborating with Temetra to refine the system to your needs.

<u>Temetra – Scheduling, planning, and meter reading</u>

We use Temetra for all planning, scheduling, and mapping on the Southern Water contract, and across all water data collection contracts, within which we input the required reads to be scheduled out to our meter readers for their daily activities. Using this system, we use geo-routing to maximise efficiencies. Both visual and automated meter reads are done using this system, following processes that we have refined over years of successful contract delivery – ensuring all SLAs and KPIs are met.

The Temetra system also supports with meter reader productivity assessments, providing a clear dashboard that shows individual meter reader productivity against targets. Usage of Temetra has ensured that we have achieved 100% successful and safe delivery of the Southern Water programme cyclical programme.

"Project Levi" – Route Scheduling

Levi is the next phase of our efficiency programme that adds in capacity to our workforce to enable them to increase visits, investing the savings into second visits that can reduce costs. Levi is made up of three blocks planned over the next three years, with the first being route optimisation.

Working with third party specialist based in Leeds we take the routes that we create daily for our meter readers and optimise them in respect of travel and walk order. The result is an optimised route that the meter reader can follow.

This programme is currently being deployed to our meter readers. Our results so far have shown material benefit when adherence to routes is high – allowing each meter reader to carry out an additional eight visits per day. Applied to our team of 42 meter readers on the Southern Water contract, this equates to an additional 336 meter read per day. We anticipate similar efficiencies in the delivery of your contract. The main benefit of this for you would be that this efficiency allows us to invest more time in more difficult to read meters.

Raptor - In-field hardware

Our in-field meter readers use the Raptor ruggedised smartphone. Raptor is powered by Android and fully compatible with Temetra for in-field meter reading activities. Our meter readers use the device to view their optimised route for their daily workload, and upload photographs as evidence of the read. This maximises the efficiency of meter reading activities, allowing us to trust the information provided. Raptor also incorporates additional applications, such as our Stay Connected company intranet application, for updates on essential safety and quality information. If lone working is required, the Raptor is compatible with a lone working application to keep our people safe.

Customer own-read solution

We also have an innovative customer own-read solution. This easy-to-use web-based solution allows Southern Water customers to securely upload readings and associated photographs of the meter. This is then transmitted directly to Southern Water's billing system via Temetra.

Reporting tools and systems

Once meter reading activities have been carried out, our enhanced reporting tools mean that Southern Water get access to meter reading data within 24 hours of completion.

People

Contract Management and Administration Teams

We use a dedicated management team for the Southern Water contract that oversee all aspects of resource planning, scheduling, and performance management. This team consists of a locally dedicated Contract Manager and management team, supported by our central administration teams. Our Contract Manager, with the support of our administration team, ensures that all KPIs and SLAs are met on the Southern Water contract through close monitoring of meter reading performance. Our administration team have all been trained on the Temetra system, including an overview of the system and how to use it to effectively monitor quality of reads.

Meter Readers

On the Southern Water contract, we use a team of 42 meter readers delivering cyclical and off-cycle reading activities, and 16 customer account officers managing more complex meter enquiries. Both teams all have undergone extensive training on the use of Temetra and have full understanding of the importance of achieving successful reads. New members of staff are supported in-field by an experienced 'buddy.' They will guide new recruits through a four-week induction process and support them to develop the key skills of entering reads and customer interaction, before they are assessed for competency and deployed as part of the workforce.

We are also rolling out our 1DC initiative on the Southern Water contract which significantly increases the amount of meter readers we have available, drawing from our national workforce of 2,200 meter readers to meet any periods of increased demand. This also mitigates the increasing cost to serve, maximising efficiency in the delivery model, and reduces carbon emissions through route optimisation.

Our meter readers are incentivised using pay per read resource modelling and high-volume automated reading. We balance this with a team dedicated to more challenging meter reading activities, such as meters that are internally located, non-household based, and any automated meter reading communication failures. This covers all bases to ensure the SLAs are met on the contract.

For your contract, you would have immediate access to a team of meter readers through our existing workforce, fully trained on your systems and ready to begin delivering your meter reading portfolio.

Southern Water Customers

We encourage Southern Water customers to use our customer own-read solution, which drives further efficiency in the delivery model, adherence to meter reading SLAs and KPIs, and supports accurate billing. Customers can get any support they need to go through the own-read process from our administration team.

Process

We have developed a multi-phase forecasting and delivery process that begins at the tender stage, running from contract commencement through to ongoing activity. On the Southern Water contract, we follow the below process from initial planning, execution, and completion of meter reading activities to ensure we achieve the SLAs and KPIs:

Planning

Tender Stage Resource Plans: We produced resource and productivity models at the tender stage, based on indicative volumes with input from our local and centralised teams. Modelling data was based on the forecasted volumes of work provided by Southern Water, split into two primary workstreams of Automated Meter Reading and Manual Meter Reading.

Property Specific Planning: We schedule resources based on the required reads and work types. To do this, we seed property addresses into our mapping software, produce heat maps to identify density, understand property types and apply productivity assessments based on region geography. This allows us to identify the resources needed to meet Southern Water's SLA. Yearly and monthly forecasting is continuously carried out throughout the contract, considering estimates in our resource availability and mapping volume read requests against potential outputs.

Assignment: As we approach the opening of a meter reading window, we base resource plans on a mix of work types and volumes. Expected are assigned at multiple levels – across the entire programme, by region, by teams, and on an individual basis to ensure we can accurately track performance against the SLA and KPIs.

Execution

Reading: We allocate activities to our meter readers via the Temetra system. Our approach is to complete as much of the available book as we can within the first few days of the window opening to give an early warning indicator to ensure we are meeting the required volumes. Our meter readers are allocated activities based on proximity to their 'home zone,' following optimised geo-routing in the Temetra system, and upload photographic evidence of successful/unsuccessful reads. Near real time checks are carried out to determine accurate reads. Any inaccurate reads are flagged, and meter readers return to site to validate information.

Reporting: Meter reading data is reported back into our administration and contract management team for performance monitoring. We report on targeted reads vs actuals to show a clear indication of our performance against the programme. Secondary audits are also undertaken on completed books to confirm accuracy.

Monitoring

Our jeopardy management plan is reviewed upon approximately 30% of completion all work cycles we deliver. If we are behind forecast, we can move resources within teams, move to increase overtime or move resources within the wider contract, and if needed, we can draw on additional resources from adjacent water contracts. This ensures that we always meet the SLA on the Southern Water contract. As Temetra is deployed across all our water contracts, our contingency resources have the benefit of using the system daily which removes the need for additional training.

'Resolve and Learn' – our overarching process to drive performance against the SLA

Our overarching process for driving successful programme delivery and continuous improvement is our 'Resolve and Learn' process. This reflects our strategy of moving away from being a traditional meter reading provider to becoming a data driven organisation that learns and improves from each cycle we complete. We undertake analytics and segmentation of work activities to understand unsuccessful visits and what is needed to obtain a reading. By doing this, we resolve any issues and learn what could be done better for the next cycle to continually improve performance against the SLA and KPIs.

This has a direct impact on our price reduction strategy and benefits future cycles, eliminating repeated skips to deliver a greater volume of successful reads – meaning more accurate billing for customers, and assurance that all SLAs and KPIs are met. We have been able to reduce the number of skips by 50% since the start of this contract following this process. You will benefit immediately from this experience, with the improvements already inherent in our delivery.

Overcoming challenges in meter reading attempts

Delivering 100% of the outsourced water data collection market means that we have extensive experience and understanding of the challenges that may delay progress in meter reading. The most common challenges that we identify across all contracts are:

- Meters that are difficult to access or inside customer homes where conducting visits is inconvenient for them. We manage this by allocating work activities to workforce groups that focus on different aspects of the work. Some focus on high-volume drive by reads, while others focus on more complex activities to drive maximum productivity. Our customer own-read solution also allows customers to submit their own readings without needing to book an appointment for a visit, making the process more convenient for them.
- Issues with remote meter reading and legacy manufacturer compatibility. Due to our experience in working with Temetra to develop the solution, we can put in place interim solutions and have worked already to ensure our automated meter reading solution is manufacturer neutral.

The scale of our activities means we have encountered these challenges many times and have developed effective solutions to combat them. We have provided a worked example of how we managed a specific instance of one of these challenges on the Southern Water contract below:

Situation

In 2012, we successfully mobilised a joint project with Southern Water, transitioning their in-field, front, and back-office meter reading service to us. This meant taking on 900,000 new meter points.

Task

Southern Water's legacy water meter manufacturer, ARAD, had issues integrating with the remote meter reading function. If unresolved, this would have caused a significant delay to progress in the cyclical meter reading programme.

Action

We worked in collaboration with Southern Water to develop an interim solution that enabled remote meter reading on a drive and walk-by basis. Over time, we worked with Southern Water to integrate this activity into Temetra, resolving the issue and building efficiency into the delivery model.

Result

Resolving the issue meant that meter reading activities could be carried out with greater efficiency, and we have since held 100% compliance with Southern Water's meter reading requirements.

16.3 - Please provide a reference, with which these claims can be verified (**1000 character limit**, **Excel document response)**

Southern Water reference for KPIs, SLAs, and use of Temetra system (16.4 requirement)

Please see the contact details below for Robert Wright, Contract and Supplier Manager and Tim Harding, Service Partner Delivery Manager who will be able to verify the information provided in question 16.2. They will also be able to verify our knowledge and use of the Temetra system to deliver this contract as required in question 16.4:

Robert Wright
Contract and Supplier Manager
Email: Robert.Wright@southernwater.co.uk
Telephone: 07771 381189

Tim Harding
Service Partner Delivery Manager
Email: Timothy.Harding@southernwater.co.uk
Telephone: 07787 273158

They have also provided a written reference that we have attached in our response to question 16.2.

Additional references to demonstrate scale and performance
Please see additional reference contact details below:

Michelle Whitaker – Thames Water
Metering and Billing Manager
Email: michelle.whitaker@thameswater.co.uk
Telephone: 07747 640639

972/1000 characters

16.4 - Yorkshire Water Services currently uses Temetra to consolidate the metering data, please confirm the Bidding Entity has experience of utilising existing utility companies' systems to deliver the services (**6000 character limit, Excel document response)**

Morrison Data Services – Pioneers of Temetra in the UK water data reading market

We have more than 12 years' experience in the use of Temetra, having first partnered with the systems provider in 2011 when the software was introduced to the water meter reading market. Since then, Temetra has grown significantly, and we have worked with them to support this growth during this time.

We now have many of our own instances of Temetra, using these to read and manage up to 5m meter points in England and Scotland. In addition, we manage 1.25m household and non-household meters in partnership with Temetra across the whole of Ireland for UISCE EIREANN (Irish Water), this enables their meter reading service providers to carry out 5 million readings per annum. Managing data across the water and energy industries, our systems have the capacity, capability, and security to take on the additional 2m meter points expected on your contract.

As the only outsourced water meter reading provider, our experience and understanding of Temetra is unparalleled in the market.

Collaboration with Temetra to tailor the system to the water data collection market

As pioneers of the Temetra system in the water data collection market, we have worked collaboratively with them to tailor their solution for water meter reading activities. Our key requirements included:

- **Unlimited Storage -** a solution with unlimited data storage capacity to support photographic evidence of meter readings.
- **Manufacturer neutral** - a system that could undertake automated meter reading on a manufacturer-neutral basis.
- **Scalable and secure -** A flexible, rapid application development system, fully scalable to manage more than 15 million readings per annum that has data security at its core.

We have worked directly with Temetra to make all these requirements a standard part of the system. For example, we as part of the journey towards a manufacturer-neutral automated meter reading system, we delivered a project in 2012 with Temetra for UISCE EIREANN (then operating as Irish Water) to deliver drive-by meter reading for up to 1m meter points, four times per annum. This project was a success, and we have since developed the system further to be able to read all major manufacturer meters remotely.

This has included the development of an integrated photograph function to support meter reading evidence, and the creation of the Automated Meter Reading (AMR system). Our 100% share of the water meter reading market means that we are best placed to continue collaborating with Temetra to further refine the system to meet your requirements and bring efficiency to the delivery of your contract.

Scale and capability

Yorkshire Water will benefit from our existing scale and capability in Temetra usage. We currently manage four/five million meters in our own instances of Temetra, so you can be fully confident that we have the scale and capability in using Temetra to manage your portfolio.

We have worked with Temetra already to develop a system and process that lets us manage all our water data collection client programmes in a single instance. This means we can take a holistic view of delivering all our client programmes, scheduling, and planning resources to maximise efficiency and minimise costs.

3271/6000 characters

16.5 - Our Vision is “To be the leading Utility nationally in Streetworks Compliance, Performance & Customer Service” by working collaboratively with Highway Authorities and our service partners to achieve this vision.

Describe how your organisation has previously managed the Streetworks process for clients in the Utility sector? This should include traffic management and pavement closures etc, enable safe access to existing meters (**6000 character limit, Excel document response)**

Opening Section – MWS

Case Study – MWS

Meter Reading Section – 1000 characters max

Safe working practice
Our teams use high visibility rucksacks to cover off meter pits when carrying out reads, making our operations clearly visible to the public. We also have standard Risk Assessment Method Statements (RAMS) for lifting meter covers and taking reads which drive consistent safe working practice. We are also developing a dashboard that will be live from next year which will show an overarching view of health and safety performance to drive continual improvement.

Minimising disruption for better customer outcomes
Where meters are internally located and require customer contact, we will work with you to get the best information we can on the best times to call and conduct reads. Your customers will also benefit from our customer own-read solution wherever access is not convenient for them. We will give them a card with a unique QR code that they can scan, taking them to our site and walking them through the process of submitting their own reading.

973/1000 characters (MDS meter reading section only)