

Domestic Supplier Liaison

September 2023

citizens
advice

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scotland

Citizens Advice and The
Extra Help Unit

Agenda

Time	Agenda Item	Lead
9.30 - 9.40	Introduction <ul style="list-style-type: none"> • Actions from May meeting 	Leanne Dullard, Citizens Advice Suzi Cassie, EHU Citizens Advice Scotland
9.40 – 10.00	Consumer Service <ul style="list-style-type: none"> • Operations update 	Leanne Dullard Jess Hawker-Meadley, Citizens Advice
10.00 - 10.15	Advice Direct Scotland <ul style="list-style-type: none"> • Operations update 	Hazel Knowles, Advice Direct Scotland
10.15 – 10.55	Extra Help Unit <ul style="list-style-type: none"> • Operations update • Portal update • Current trends and concerns 	Natasha Gilmour George Holmes Angus McMillan, EHU Citizens Advice Scotland
10.55 – 11.05	Break	
11.05 – 11.15	EHU CivTech Challenge project	Andy Bell, HelpFirst
11.15 – 11.30	Initiatives regarding challenging client behaviour and the impact on adviser mental health Lightning talks: <ul style="list-style-type: none"> • E.ON Next - adviser wellbeing partnership with MIND • Advice Direct Scotland - machine learning software for identifying service complaints 	Led by Jess Hawker-Meadley, Citizens Advice
11.30 – 11.40	Energy Ombudsman	Adon Laizans, Energy Ombudsman
11.40 – 11.50	Citizens Advice Energy Policy Team Energy policy update	Citizens Advice
11.50 – 12 noon	AOB & Next meeting date	Leanne Dullard, EHU Citizens Advice Scotland

Citizens Advice Consumer service

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Leanne Dullard and
Jess Hawker Meadley

Consumer service systems project - 2024 - 1 / 3

- In our last meeting we announced that the Citizens Advice consumer service are launching a project to replace their current systems with in house systems.
- This project covers replacing Flare 21 with Casebook for Consumer.
- The scope of the project also includes:
 - Client facing webforms
 - The Referral Agency Signposting Tool (RAST)
 - Referrals to partners and
 - Data sharing.

Consumer service systems project - 2024 - 2 / 3

- The product team have been working hard to understand how the advisers currently use Flare 21 in order to build Casebook for consumer



Consumer service systems project - 2024 - 3 / 3

- We have also started research to understand how partners access and use referrals.
- A survey was sent to the liaison group mid August 2023.
- There is an options paper being developed to look at how referrals will work in the new systems.
- We are continuing to send out updates to our mailing lists.
- The project email address is consumersystems@citizensadvice.org.uk
- Any questions?

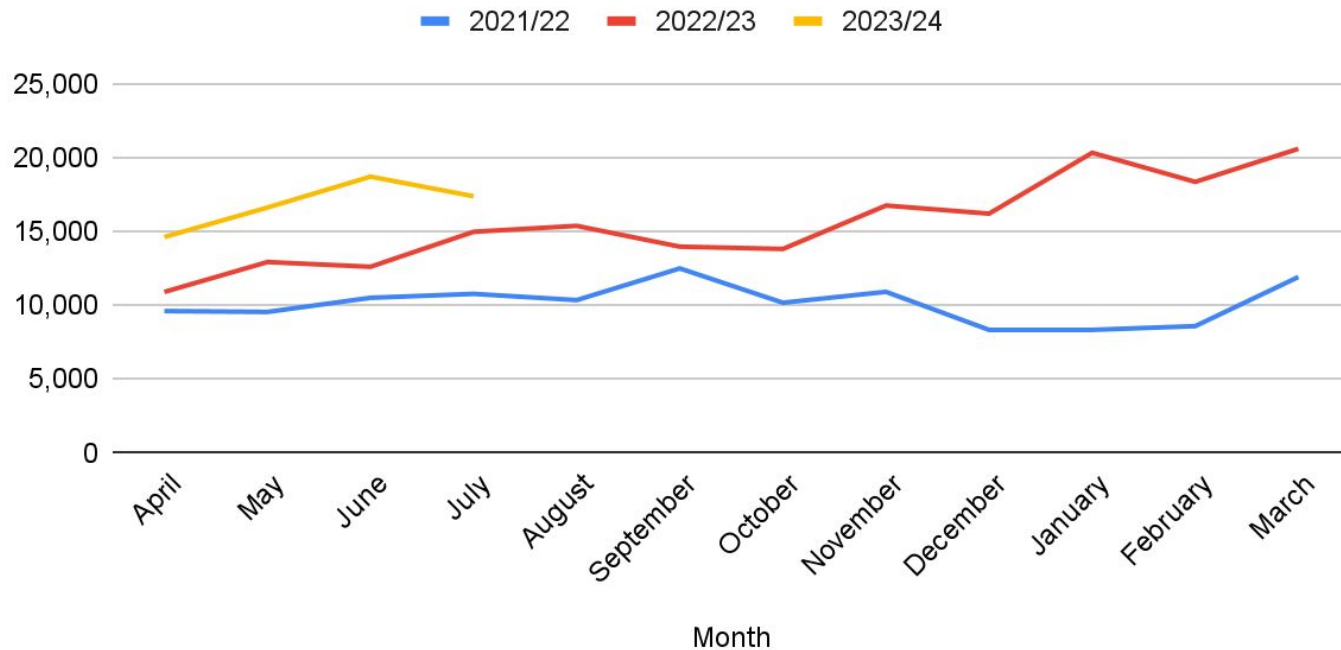
Performance and Operations

Key points from quarter one are:

- Demand for the quarter increased by **1.79%** compared to quarter 1 2022/23, however we did anticipate much higher volumes than were received based on the trajectory of the last quarter
- Priority call demand saw a **88%** increase over the quarter when compared to the same time period last year
- Client Satisfaction remained above KPI
- Overall quality for the service was achieved across the year

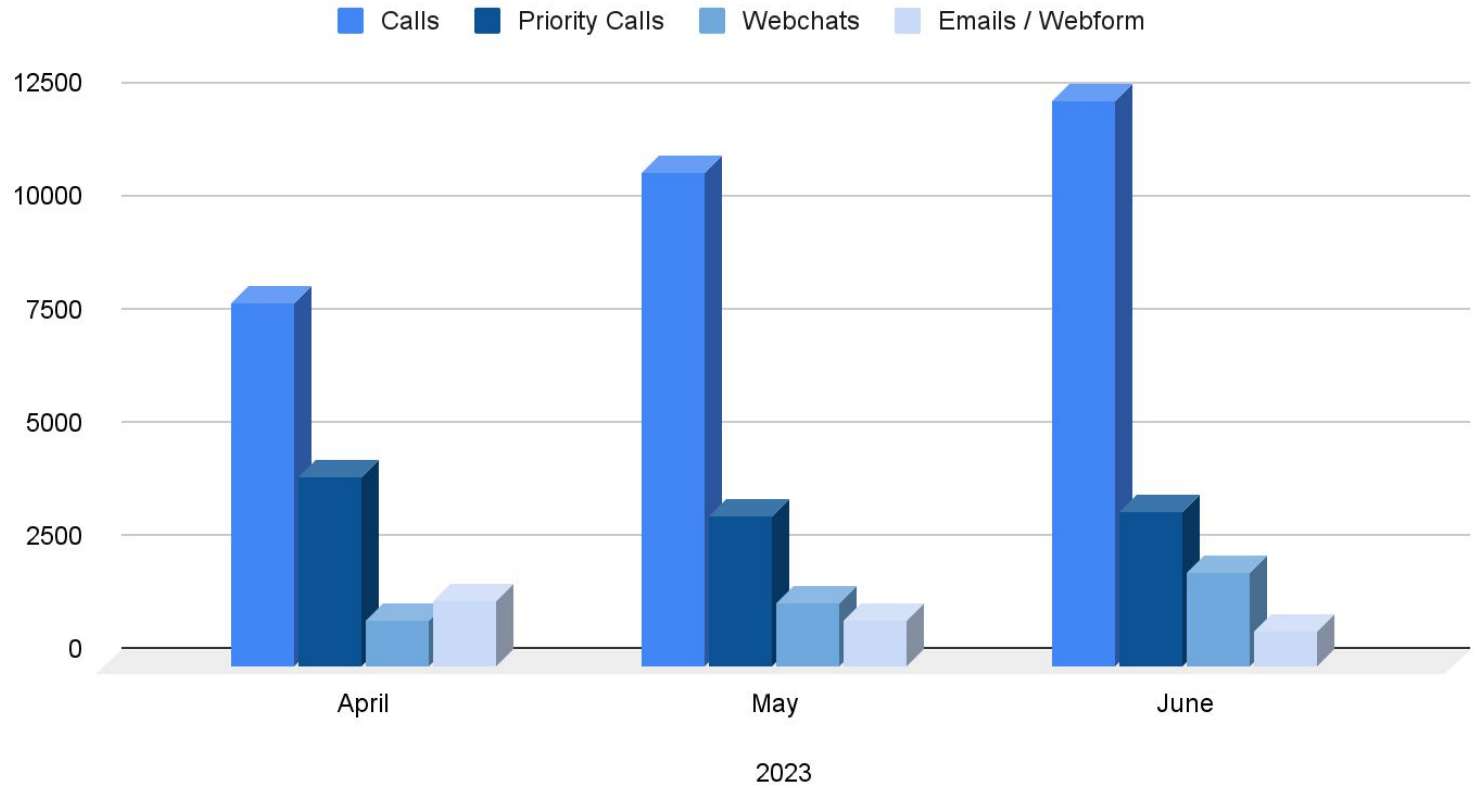
Contact volumes comparison 2021/22 to 2023/24

Yearly Contact Volume Comparison of Contacts answered 2021 - 23



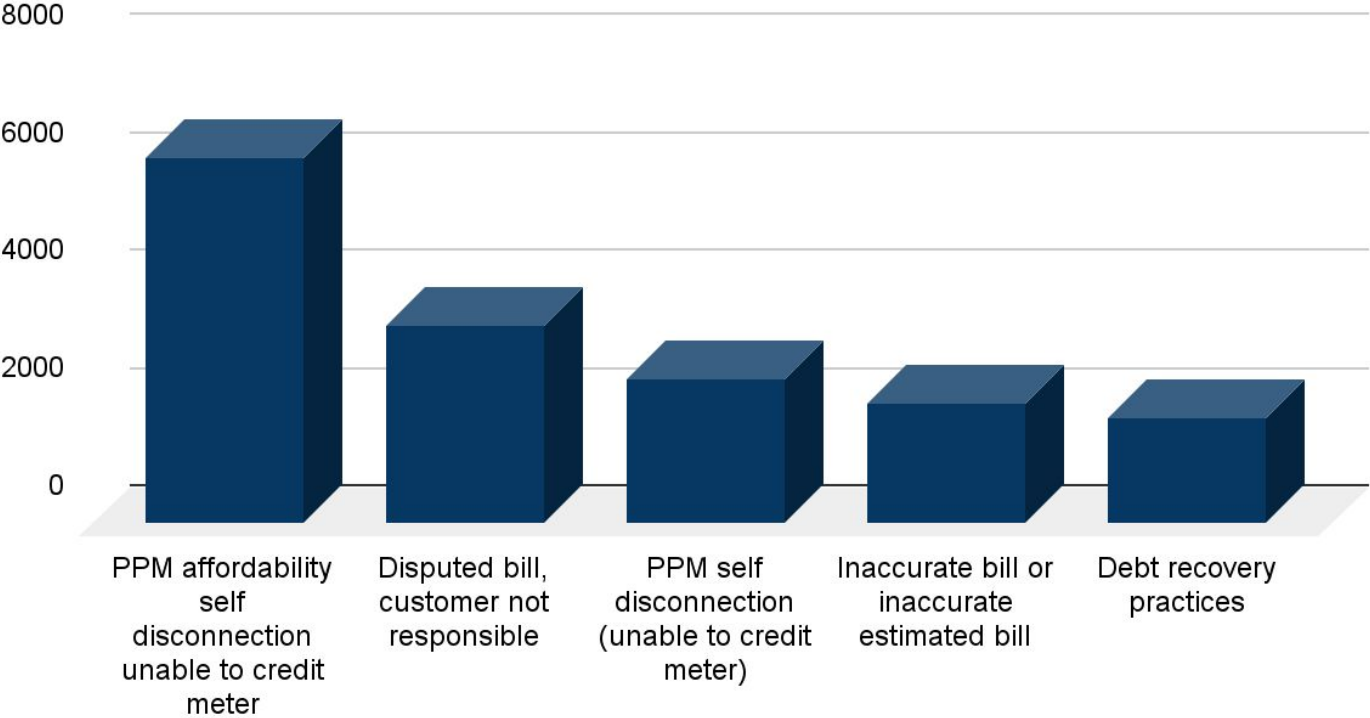
Q1 contacts answered by channel

Q1 - Contacts by Channel



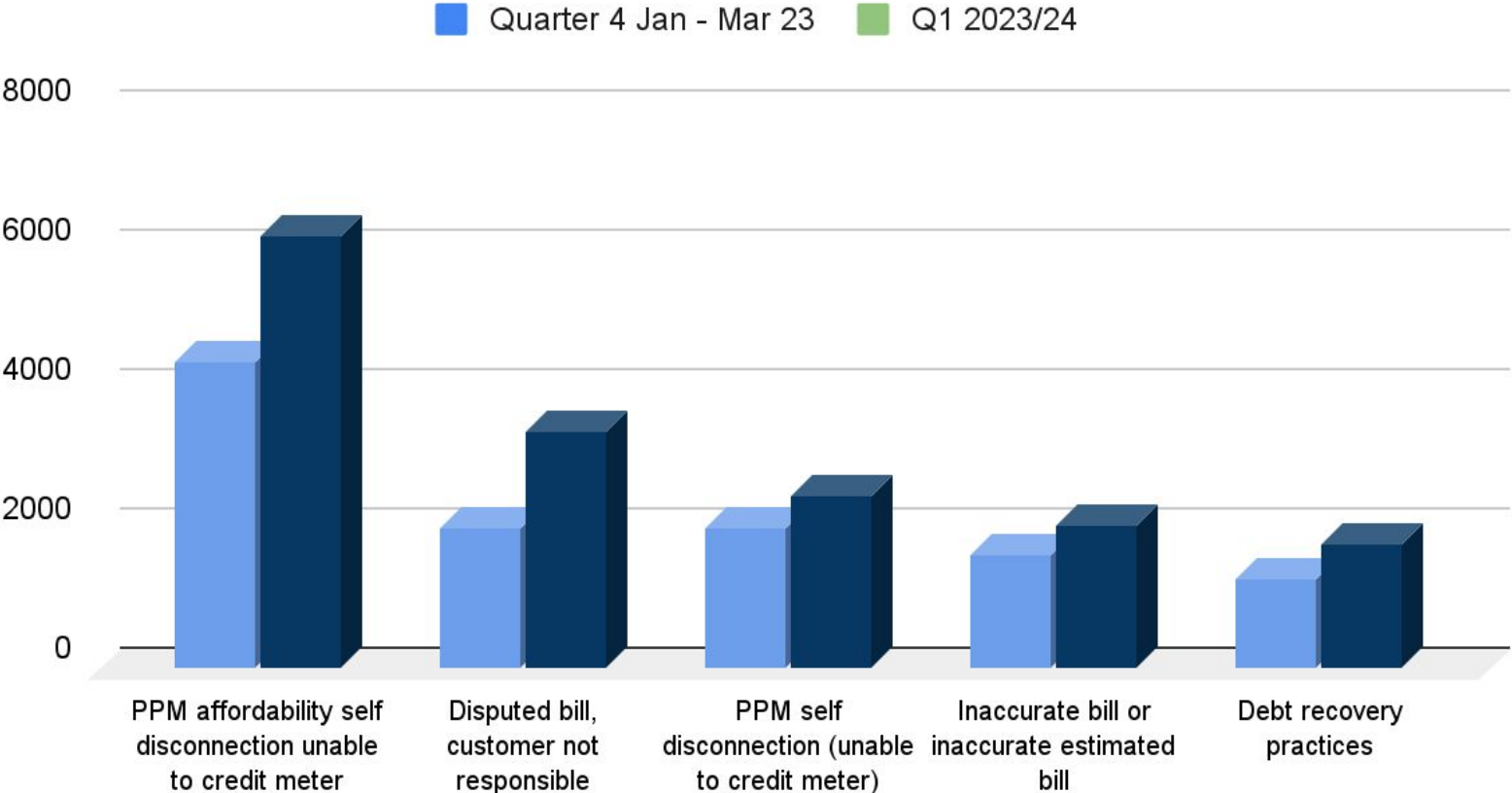
Trends Q1 2023/24

Quarter 1 April - June 23



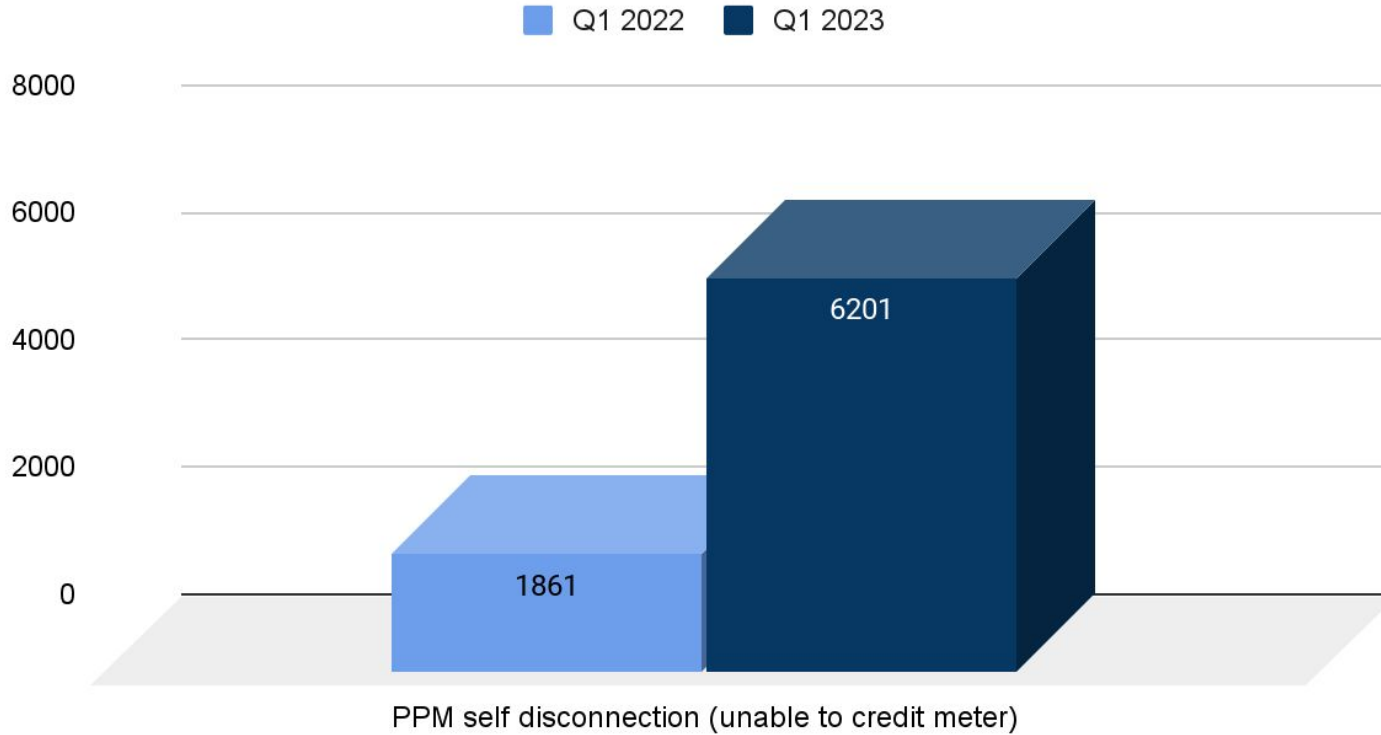
Trends Q1 2023

Quarter 4 Jan - Mar 23 and Q1 2023/24



Trends

Q1 2022 VS Q1 2023



Q1 Trends split by nation

England		Wales	
PPM affordability self disconnection unable to credit meter	5853	PPM affordability self disconnection unable to credit meter	348
Disputed bill, customer not responsible	3250	PPM self disconnection (unable to credit meter)	148
PPM self disconnection (unable to credit meter)	2329	Disputed bill, customer not responsible	134
Inaccurate bill or inaccurate estimated bill	1946	Inaccurate bill or inaccurate estimated bill	99
Debt recovery practices	1698	Debt recovery practices	89
Meter accuracy	1064	PPM affordability: topping up causing financial detriment	73
Direct debit issues	1052	Unable to credit PPM (faulty meter/payment device)	52
Unable to credit PPM (faulty meter/payment device)	889	Failure to credit/refund	51
Final account reconciliation	888	Non domestic contract issues	49
PPM affordability: topping up causing financial detriment	875	Domestic supply disconnected	44

Google analytics - energy pages

Top 10 energy website pages	Q1 2023/24	Q1 2022	% difference
Grants and benefits to help you pay your energy bills	102,367	291,789	- 64.91%
How to read your smart electricity meter	64,486	60,508	6.57%
How to read your energy meter	58,106	58,062	0.08%
How to read your smart gas meter	43,894	45,040	-2.54%
Save money using your electrical appliances	37,403	N/A	N/A
Struggling to pay your energy bills	30,209	33,176	-8.94%
Getting a Smart Meter Installed	26,525	16,691	58.91%
Find out if your energy meter is faulty	26,493	27,252	2.79%
Get help with the cost of energy efficiency	25,424	N/A	N/A
Moving Home dealing with your energy supply	23,462	32,430	-27.65%

Total energy page views Q1 23/24	825,382
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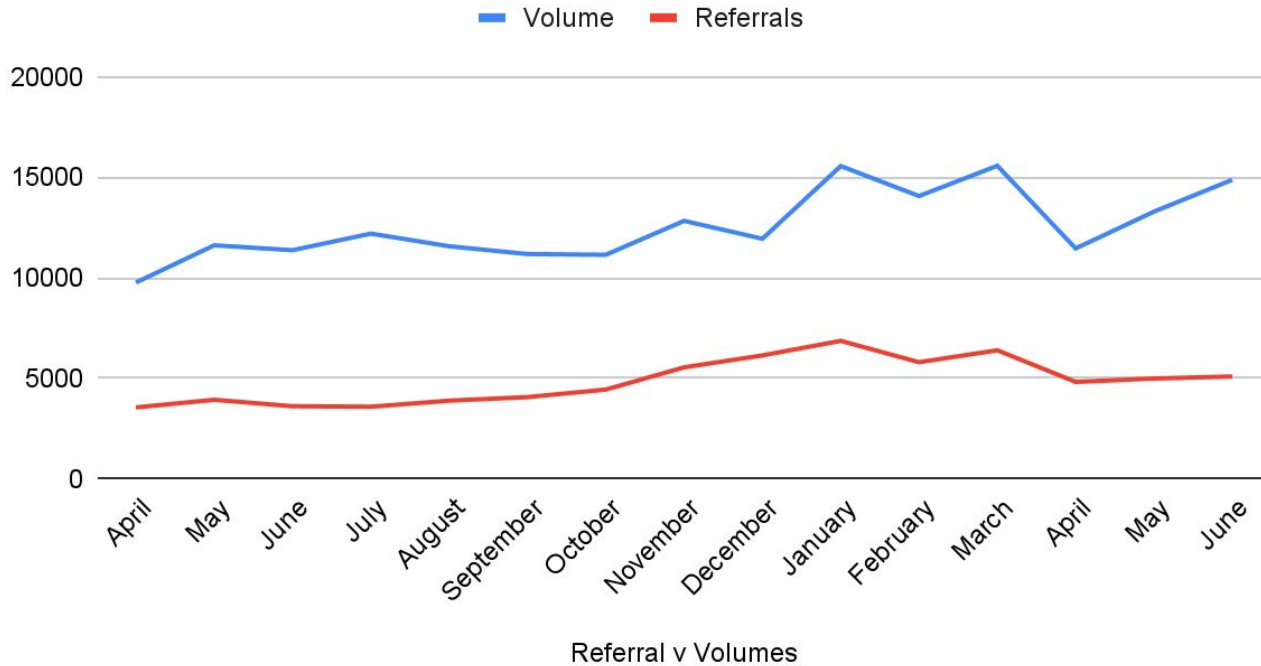
Signposted cases for Q1

Total signposts for Q1 - 14,435

Signposted to	Total signposts
Other	5368
CAB - England and Wales	4825
CAB - Adviceline	1938
Energy Ombudsman	734
National Debtline	551
Ofgem	225
Shelter	217
Information Commissioner's Office	132
ConsumerLine	120
Law Society	95

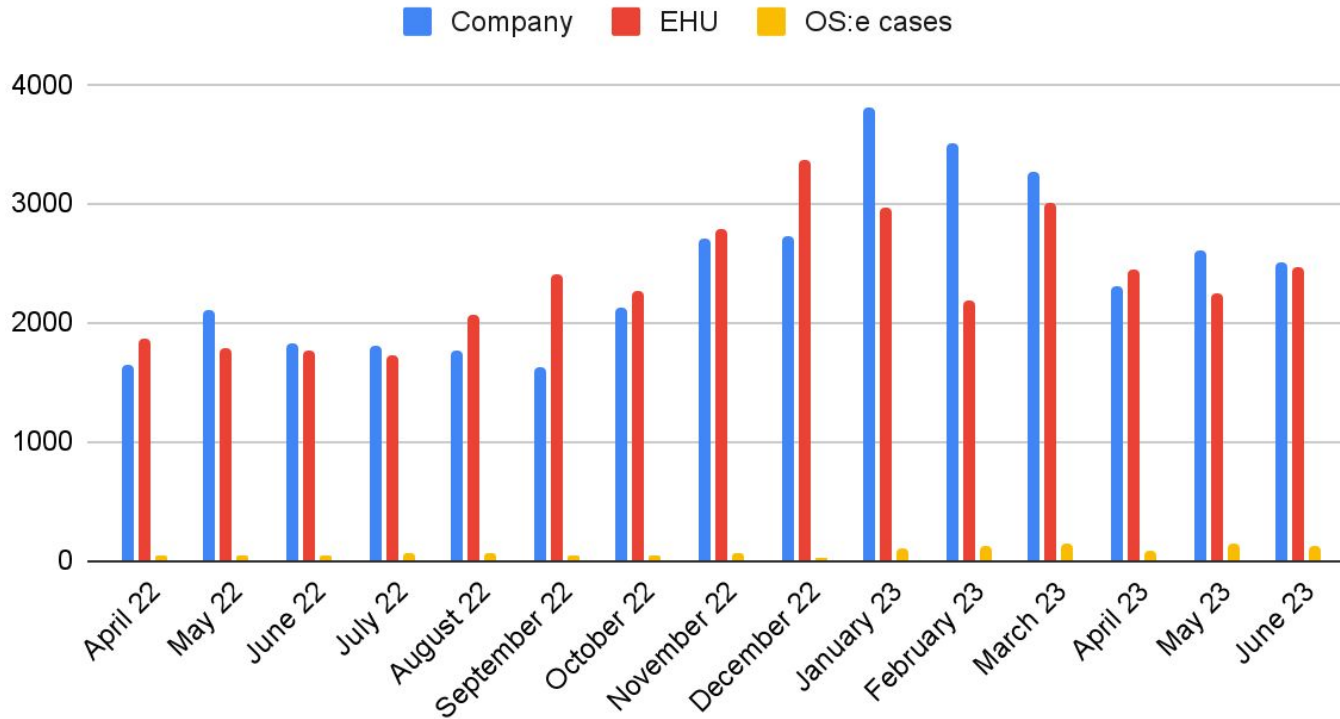
Referrals against volumes April 22 - June 23

Q1 Volumes vs Referrals April 2022 - June 2023



Referral proportions April 22 - June 23

Q1 - Referral Proportions



Presented by: **Leanne Dullard**
Date: **6 September 2023**

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Presenter:

Hazel Knowles

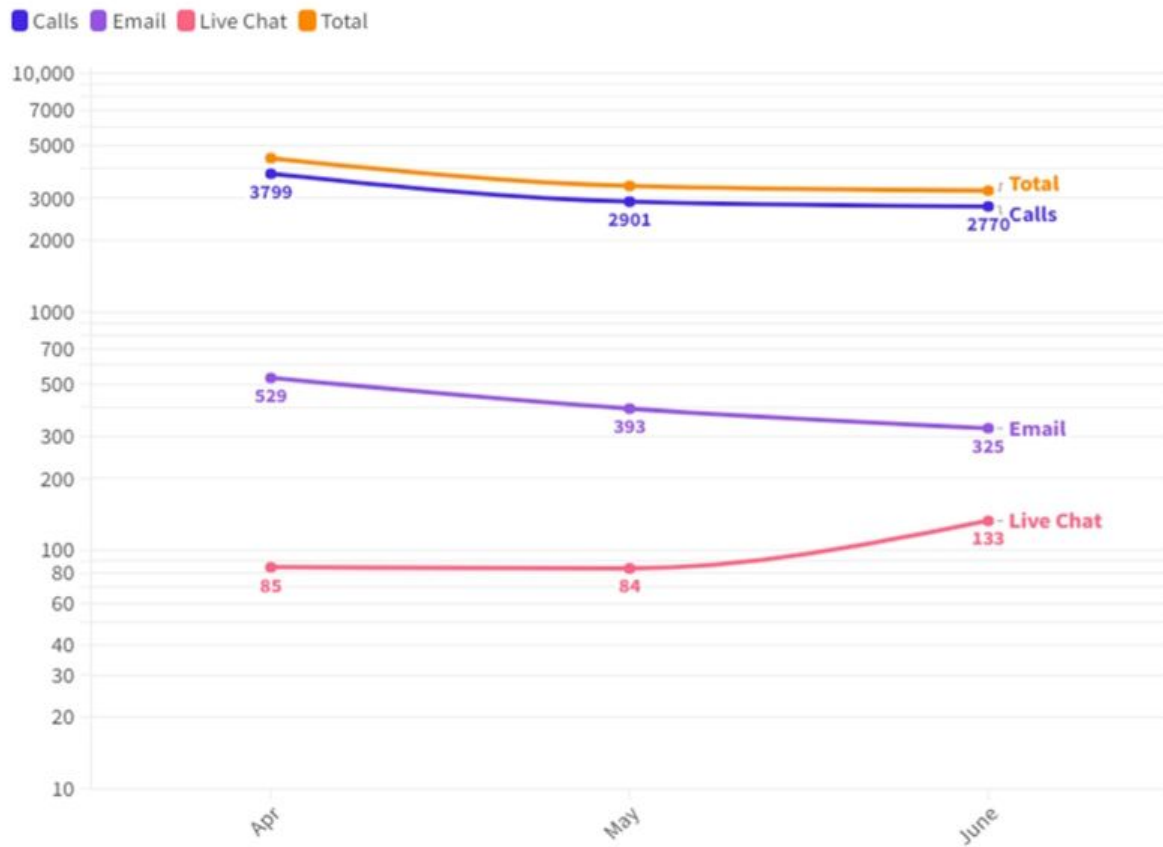
Advice Direct Scotland



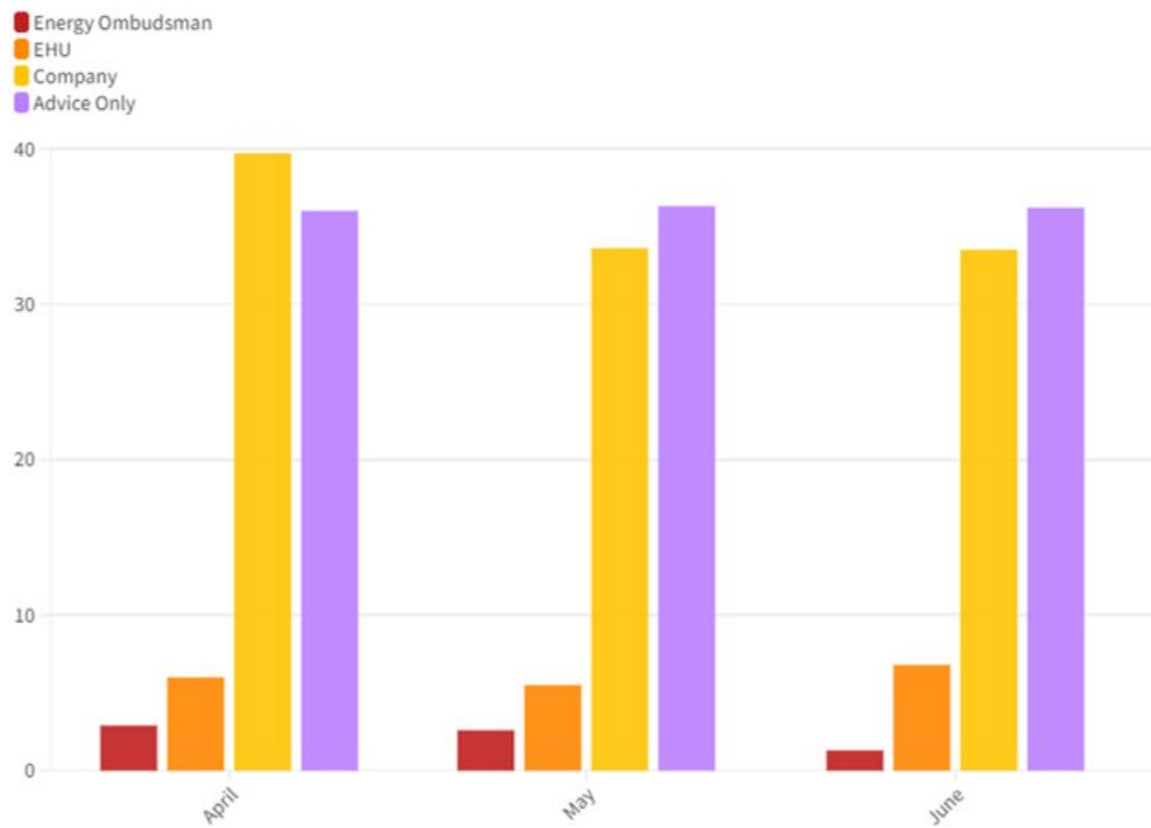
VOLUME VS FORECAST VS Q1 22



ENQUIRIES BY CONTACT TYPE



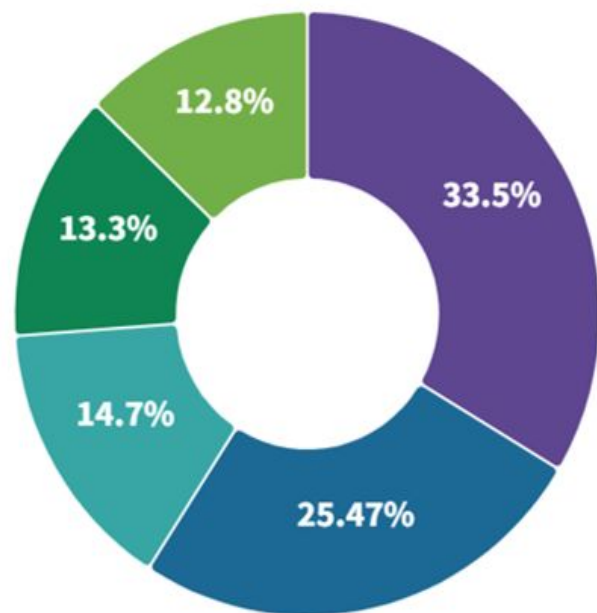
REFERRALS



REPEAT CONTACTS

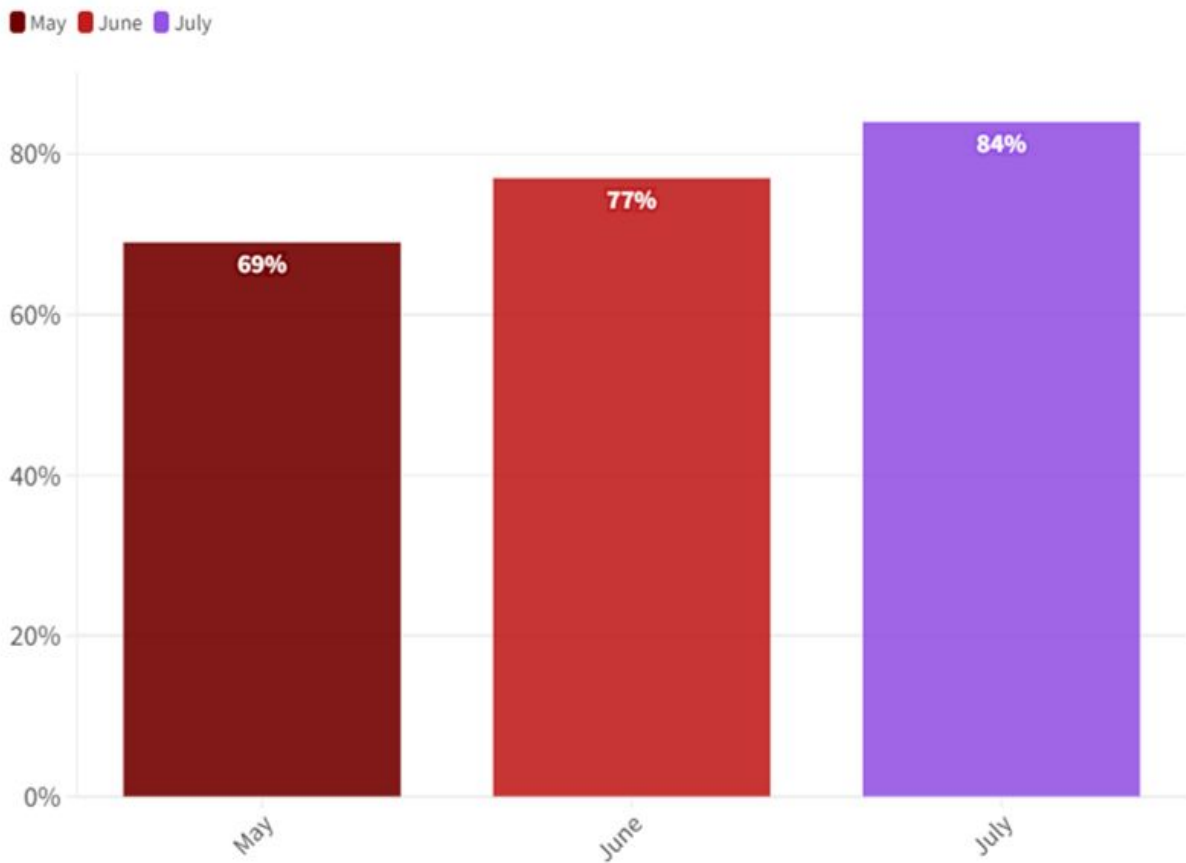


PERCENTAGE BREAKDOWN OF TOP 5 CODES

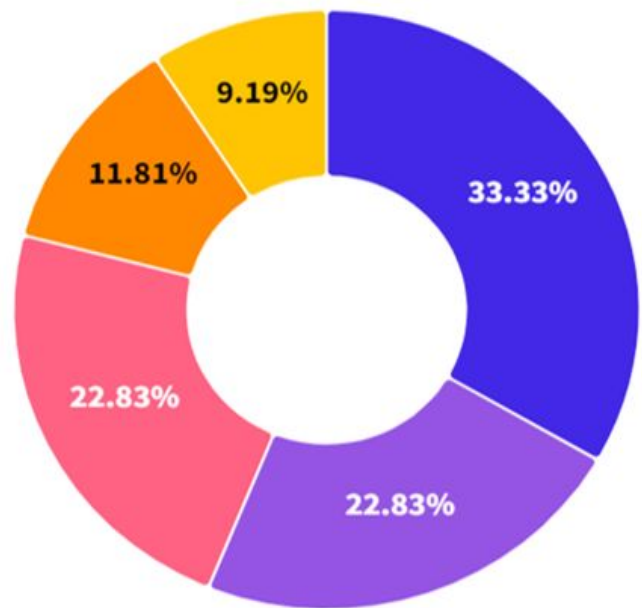


- BE20 Disputed bill, Customer not Responsible
- AD2 Customer Support Payment
- BE17 Direct Debit Issues
- ME4 Meter reading/Data Collection
- BE29 Inaccurate Bill or Inaccurate Estimated Bill

LIVE SUPPLIER REFERRALS



TOP 5 AFFORDABILITY CODES



- DD9 PPM affordability: Self Disconnection (Unable to Credit Meter)
- DD18 PPM affordability Topping up Causing Financial Detriment
- DD2 Debt Recovery Practices
- DD10 Unsuitable Payment Scheme/Payment Method
- DD20 Credit Meter Affordability: Next Payment to Cause Financial Detriment

TARGETING VULNERABILITY

Looking
ahead to
winter and
regulation
changes

2 Million paid
out so far
from Home
Heating
Fund

Media
campaign
targeting
vulnerable
customers



**Are you struggling
to keep your house
warm?**



**Are you struggling
to balance the
cost of energy and
food?**

(cont)

MINISTERIAL WORKING GROUPS



Vulnerable
Consumers



Rural
Consumers



Non-Domestic
Consumers

PARTNERSHIP WORKING



Energy
Consumers
Commission



Federation
of Small
Businesses



Minority Ethnic
Carers of
People Project

TEAM WELFARE

Continuing our focus on team welfare and training, we have run workshops on the following topics:

- Identifying and preventing unconscious bias
- Mind Your Language - Why It Is Important
- Strategic Approaches to Wellbeing and Resilience Programme
- Vicarious Trauma

We have continued to supply free staff lunches and fruit twice a week through our social enterprise, and free coffee from a local coffee shop which also functions as a social enterprise providing meals to children.



DARREN'S STORY



"I had a problem with my bill and tried to sort it out on my own, every time I called, I ended up on hold and would run out of credit on my phone, I can't afford a phone contract, so it's just pay as you go.

After weeks of trying to call I called the energy advice team, they sorted me out straight away and got me through to my supplier.

They also helped me with money from a fund, and checked all my benefits were ok.

I'm so relieved."



Thanks!



EHU





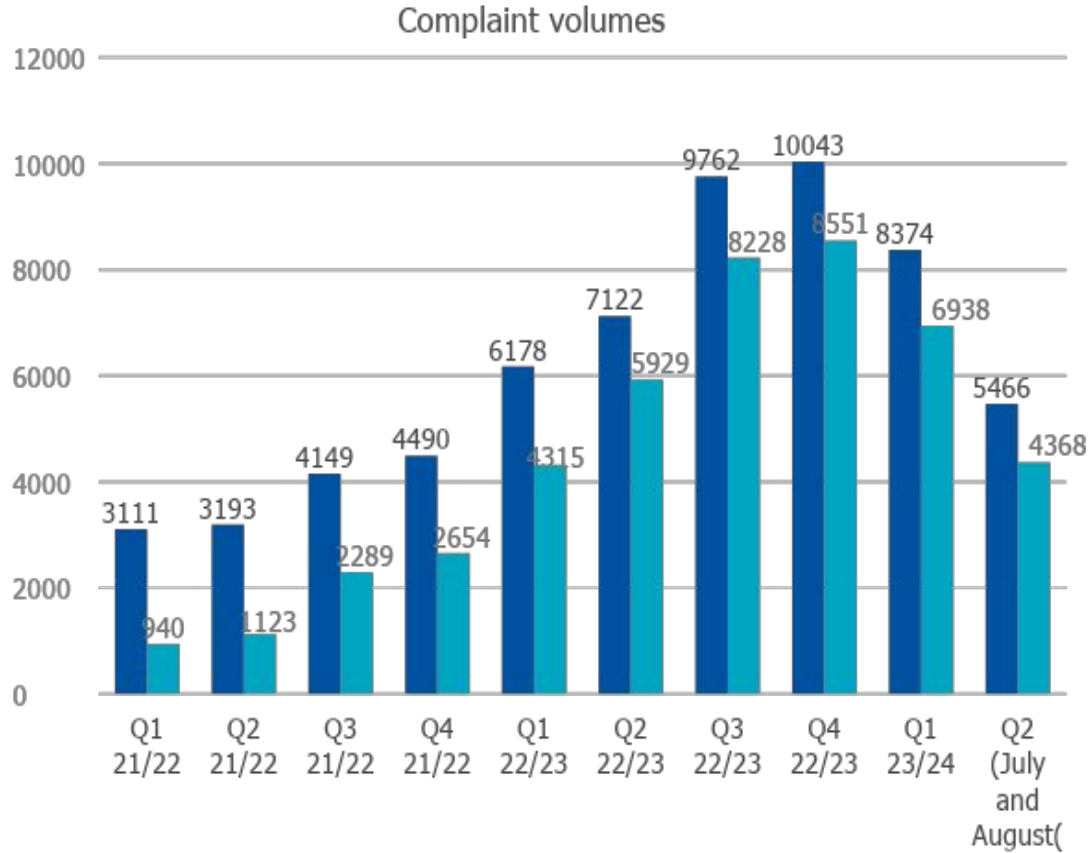
Supplier Liaison Update

6th September 2023

Extra
Help
Unit



Casework Volumes Q1 2022/23



■ All complaints (complex and priority) ■ Priority Complaints

Total complaints = 8374
↓17% from Q4

Priority Complaints = 6968
↓19% from Q4

Self Disconnection = 6,047
↓10% from Q4

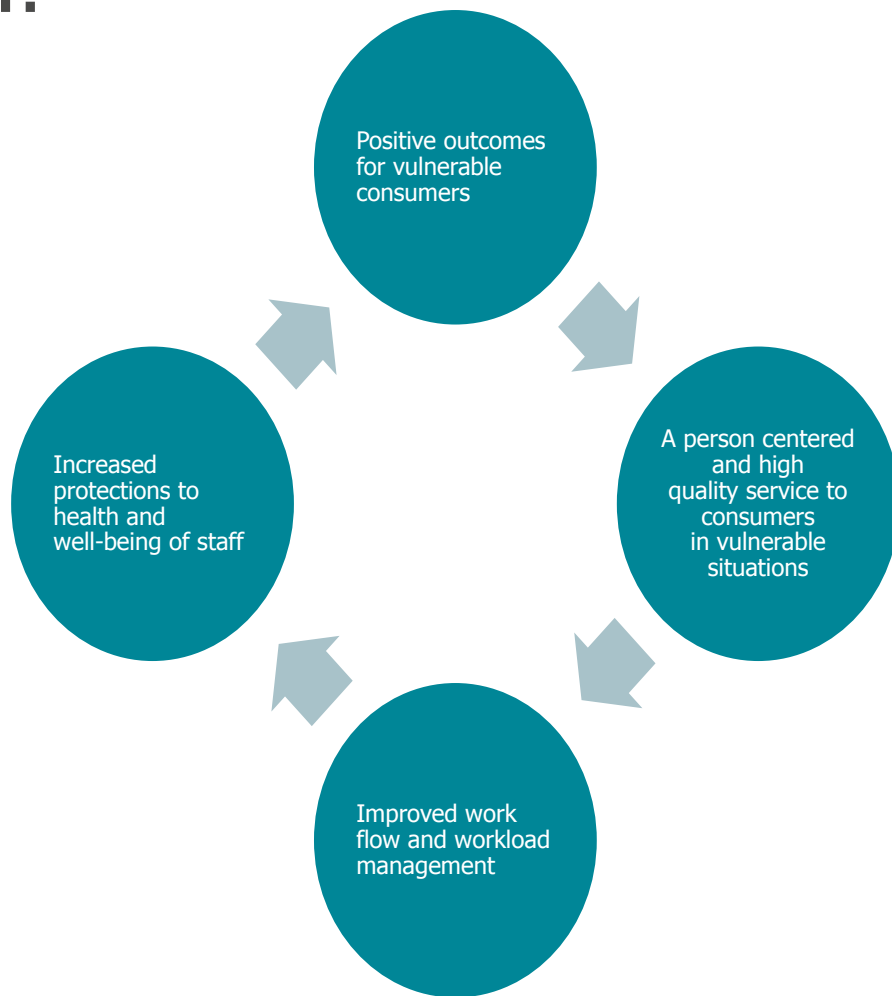
Self Disconnection cases
108% higher in Q1 2023/24
compared to Q1 2022/23

83% of complaints were
classified as 'priority'





The KPIs for 23/24 are designed to prioritise and deliver:



KPIs 23/24



Area	KPI 23/24	Q1 23/24
Responding to Complaints	<ul style="list-style-type: none"> 95% of priority complaints are raised with supplier within 48 hours of case being received 	90%
	<ul style="list-style-type: none"> 90% of complex complaints raised with supplier within 20 days of case being received (from Q2) 	77%
Case Resolution Timescales	<ul style="list-style-type: none"> 75% of domestic priority complaints resolved within 28 days 	86%
	<ul style="list-style-type: none"> 70% of domestic complaints resolved within 85 days 	79%
Positive Outcomes	<ul style="list-style-type: none"> 95% of domestic complaints resolved with a positive outcome/change 	96%
Quality Assurance	<ul style="list-style-type: none"> 90% of cases checked meet the required quality standards 	92%
Customer Satisfaction	<ul style="list-style-type: none"> 85% of Domestic consumers surveyed satisfied or very satisfied with overall quality of service 80% of domestic consumers surveyed satisfied with outcome achieved 	93% 87%
Staff Morale	<ul style="list-style-type: none"> 75% of staff describing their current mental health and wellbeing as satisfactory 75% of staff reporting they have a good sense of achievement from the work they do 	In progress

Accent Customer Research

cases closed March to May 2023

93% satisfied or very satisfied with overall quality of service

92% happy with length of time to deal with problem

87% satisfied with outcome

77% felt EHU helped them find a way forward

53% felt their mental health and well being improved after support

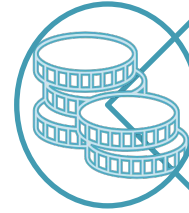
70% felt less stressed after EHU support



"The lady I dealt with, Debbie Goldie, was fantastic. She was so empathetic, informative and you could really tell that she loved her job and helping people. With her approach to my case, the way she spoke to me and the way she explained things, I felt like I had the weight of the world lifted off my shoulders. I have never and will never forget how much she not only helped me but how she supported me throughout my case"

Accent report July 2023

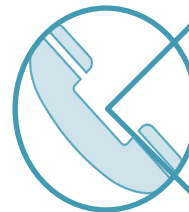
Outcomes and measures



Financial redress
£1,303,611



Fuel Bank Foundation
Partnership
136 Fuel Bank Vouchers
totalling over £4k



Answered 97% of calls
19824

Additional Support Project – Quarter 1 2023 Update

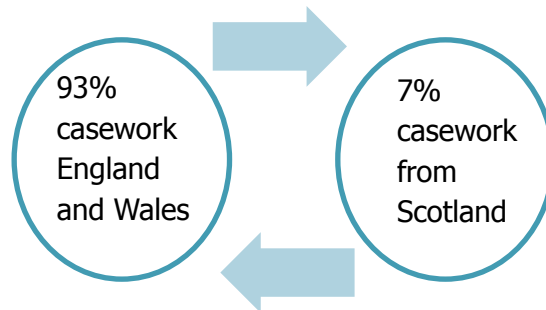
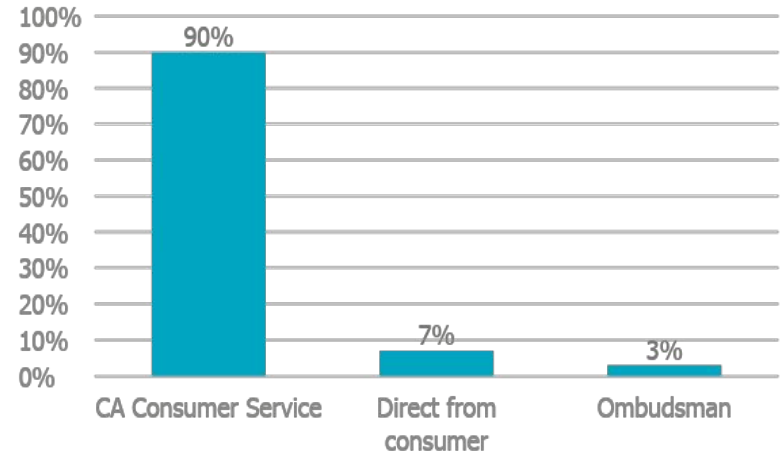
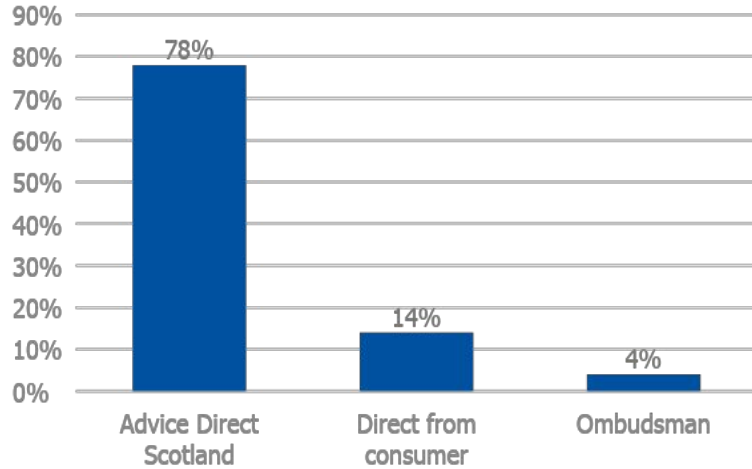
Additional Support Project

This project is enabling consumers to be further supported within the EHU for those who may be unable to access help themselves. The project is helping to maximise income, and importantly helping to raise awareness of other support mechanisms available and how to access this support. It is also hoped the advice will help reduce re-occurrence demand. The second Support Worker went on maternity leave in June.



- 74 consumers were supported across Q1
- £27,300 achieved in financial/potential financial gain
- Main advice themes: 30% benefits check, 21% trust funds, 15% benefits advice/trust
- Main outcomes: 31% support accessing advice agency, 28% benefits/income maximisation advice.

Referral Partners



Operational challenges and development 23/24



Resources Appointed:

- ✓ Service Delivery Manager
- ✓ Team Manager
- ✓ Quality Assurance Manager

Resources in progress:

- › Caseworkers
- › 2 Lead Caseworkers
- › 2 Quality Assurance Officers



- › EHU team introduced the Civ tech challenge at the demo day
[Challenge 8.1 — HelpFirst — CivTech Demo Day](#)
- › Reporting
- › Promotion of EHU work- What the front line of the energy crisis really looks like:
https://www.heraldscotland.com/business_hq/23668528.agenda-fr-ont-line-energy-crisis-really-looks-like/
- › New office premises

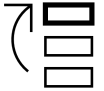


Controlling workloads



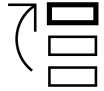
Controlling Workloads

- Implemented plan w/c 7/8/23 with caseworkers being allocated 1 case per day and max 6 priorities with staff dealing with complex cases on rotational basis and off line for full week.



Controlling priority work volumes

- Aim for priority cap of 6 in most circumstances across Monday to Thursday



Why keep priority cap at 6?

- To ensure we are advocating effectively on priority cases
- Focus on quality
- Consider impact in longer term of staff taking high number of priorities every day on liveload and morale



Training

Commit to ensuring staff are not disadvantaged by attending and equally not attending training, consider:

- Morning allocation
- Whether our non urgent line needs to go off
- Whether referral partners should be asked to email priorities for the period the training covers

Arrange training in the afternoon where possible to enable staff to consolidate and absorb learning. So investment in learning and time is not lost.



Contingency measures

What can be considered when demand becomes unmanageable?

- ✓ Switch off non urgent telephone Line – this may be for fixed periods of time in the day or all day, consumers are given the option to be routed through if their call is urgent
- ✓ Revert to email referrals from referral partners or one referral partner
- ✓ Direct referral to Fuel Bank Foundation for Fuel Vouchers
- ✓ Review how Leads can help in allocation process e.g. micro-business cases
- ✓ Ask suppliers to email responses
- ✓ SPLs consolidating outstanding priority cases with suppliers
- ✓ Advising referral partners to refer directly supplier and we follow up as enquiry if needed
- ✓ Reduce number of staff on work allocation plan to increase numbers on line
- ✓ Asking referral partners to refer consumers directly to supplier if they have not spoken to supplier or cannot get through to supplier



What happens when we start to get a backlog on priority cases?

KPI is 95% of priority complaints are raised with supplier within 48 hours of case being received

We have set the KPI so we're not trying to deal with every single priority that comes into our service on the same day when volumes are very high. Only when we start to get a backlog of priority cases of more than 24 hours would we need to consider other actions including:

- ✓ Priorities to be set up and added to priority unallocated and shared across the team the following day.
- ✓ If team are reaching the cap quickly and there are concerns that consumers coming through MCT route are being prioritised quicker, we can move to getting the team to set up priorities and transfer to unallocated to allow the Team Managers to allocate priorities in date order. This means we are answering our phones and can manage expectations



Portal Update

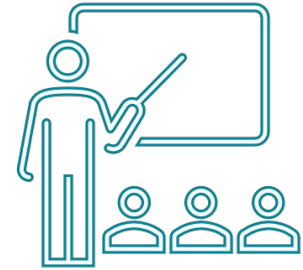
- Final testing and moving portal into a live environment
- Data protection requirements and data sharing agreement
- Roll-out and feedback – Q3 23/24 and feedback sessions January 2024



Interpreting data in reports and on the EHU supplier portal

Four key status reasons:

- Allocated To Supplier
- Reallocated To Supplier
- Review Response
- Consumer Information Requested



It is important suppliers use the **Due Date** information to identify when Allocated To Supplier and Reallocated To Supplier are out of target.



Referral Trends

Category Code	Q1 23/24	Q2 23/24 estimate
Self Disconnection Categories	6,041	5,695
Unable to Credit PPM Categories	619	563
Disputed bill, customer not responsible	152	176
Debt recovery practices	149	174
Inaccurate bill or inaccurate estimated bill	144	185
Supply point administration query (MPRN/MPR/MPAS)	103	152
Meter provision or exchange	101	83



Estimate for Q2 is a projection based on data for July and August, if referral volumes were consistent over the remainder of the quarter.



Repeat self-disconnection cases/negative budgets

- › Between January and June the total number of self-disconnection cases logged for consumers with 6 or more cases = **1,549**
- › Total number of consumers who've had 6 or more cases in first half of 2023 = **201**
- › We have provided Ofgem with anonymised case studies, general observations and concerns about how different piece of existing and new regulation fit together.
- › Ofgem has committed to explain its expectations on suppliers in the context of our examples and clarify how they expect debt to be handled going forward.
- › The above volume is 12% of all self-disconnection cases logged during this period.



Self-disconnection case study

The consumer had anxiety and depression and agoraphobia.

The credit was about to run out on her electricity PPM. Her next Universal Credit payment was not due for 6 days and would only be £17 due to sanctions. She was awaiting contact from DWP regarding an appeal. The consumer was struggling to buy food and had two pet dogs to care for so the EHU provided her local CAB number for food bank help. The supplier provided ASC of £50 as a goodwill gesture to keep the supply on. They also agreed to change the smart meter from PPM to credit mode as she was housebound due to agoraphobia.



The consumer felt reassured that she would no longer have to continuously watch the meter and worry about going off supply as this had been negatively affecting her mental health. The supplier provided information about their hardship fund to address a debt balance and agreed for her to pay what she could towards the ongoing cost.

Importance of narrative, context and detail in responses

Ongoing work with our team to refresh their knowledge, cover regulatory changes and to ensure we are acting as an effective consumer advocate.

Suppliers also have a part to play in ensuring cases do not become lost, disjointed or unnecessarily prolonged. Please ensure the following:

- Narrative is included regarding what has happened or what actions were taken
- Provide context to points that are made
- Anticipate what we might need to know next
- Properly explain balances, reductions and goodwill – and confirm amounts
- Have a focussed EHU team who understand our requirements and process



Working Together

August Bank Holiday

Despite low volumes some priorities are still received either directly from consumers or via ADS. If it's not business as usual for a domestic energy supplier, a contingency plan must be agreed with us.

Festive period

Please note we will be open standard hours on Friday 22nd and Friday 29th December. And closed on the 3rd January.

Reminder will be sent in October.





Questions?

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Break

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Domestic Supplier Liaison meeting

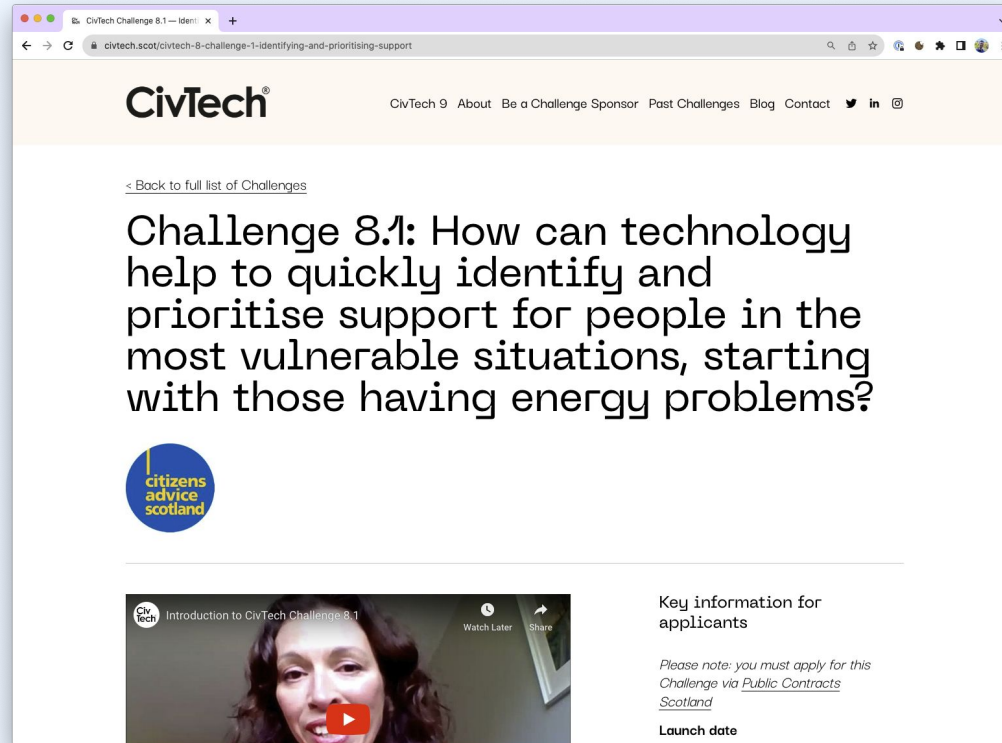
6th September 2023



Agenda

- What is CivTech?
- What is HelpFirst?
- We need your help!

What is CivTech?



The screenshot shows a web browser window with the URL civtech.scot/civtech-8-challenge-1-identifying-and-prioritising-support. The page features the CivTech logo and navigation links: CivTech 9, About, Be a Challenge Sponsor, Past Challenges, Blog, Contact, and social media icons for Twitter, LinkedIn, and Instagram. A link for '< Back to full list of Challenges' is present. The main heading reads: 'Challenge 8.1: How can technology help to quickly identify and prioritise support for people in the most vulnerable situations, starting with those having energy problems?'. Below this is the 'citizens advice scotland' logo. A video player shows a woman speaking, with the title 'Introduction to CivTech Challenge 8.1' and controls for 'Watch Later' and 'Share'. To the right, the section 'Key information for applicants' includes a note: 'Please note: you must apply for this Challenge via Public Contracts Scotland' and a 'Launch date' field.

What is HelpFirst?

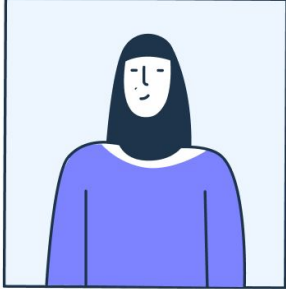




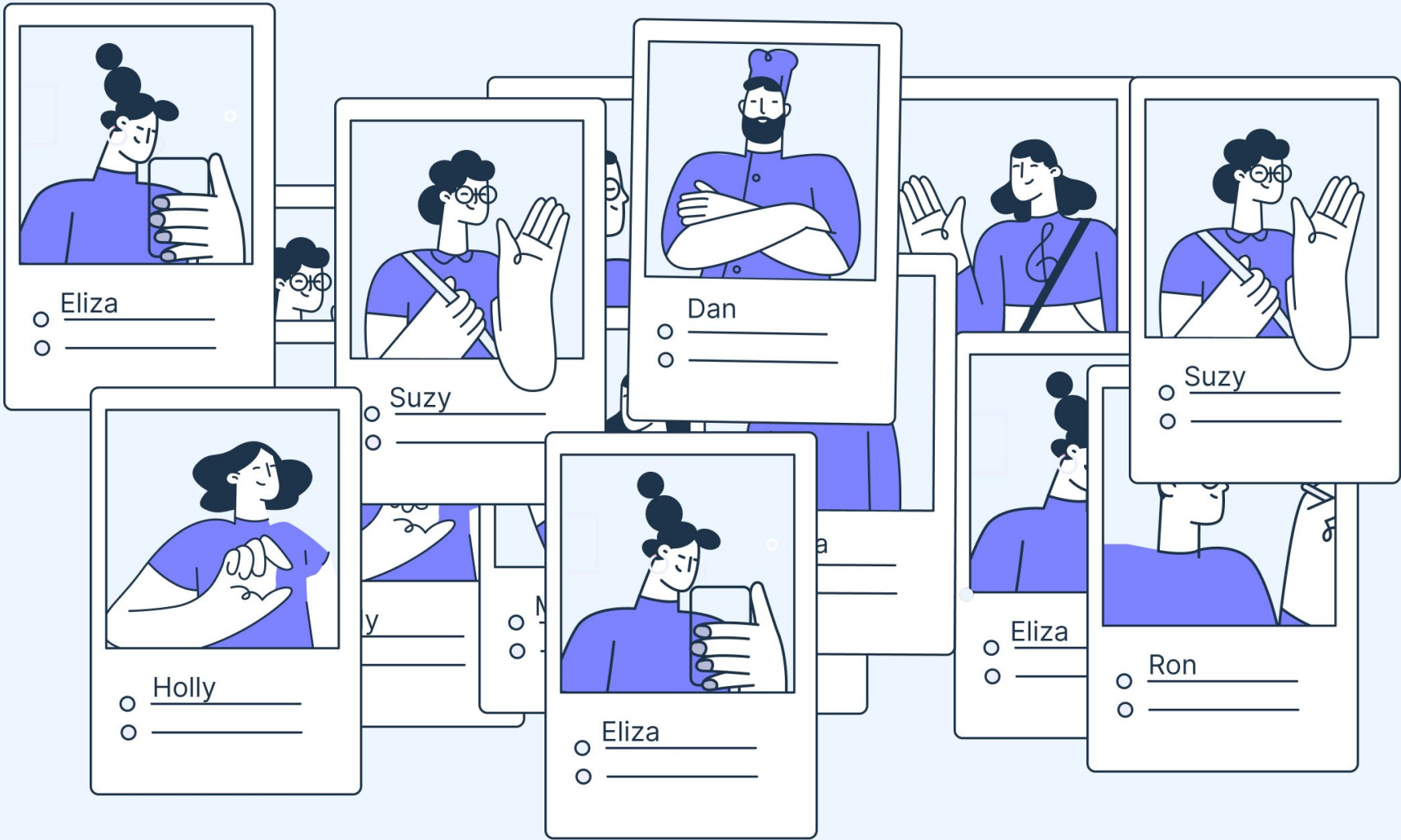
Suzy
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Dan
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Fatima
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Eliza

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Suzy

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Dan

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Suzy

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Holly

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○ _____



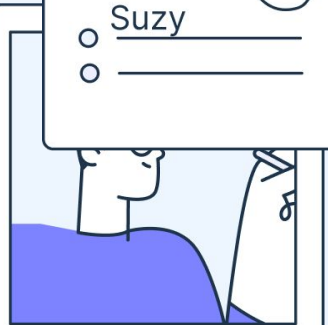
Eliza

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Eliza

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Ron

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Current situation: name soup

The screenshot displays the Dynamics 365 interface for the EHU Complaint Management System. The main view is a table titled "Active Cases*" with 11 columns. The data is as follows:

Case Number	Created On	Timer Status (Timer)	Case Type	Consumer Details	Complaint Against	BPF Stage	Status Reason	Category	Categor
EHU-01049-K1W7K	5/9/2023 8:26 PM	In Progress	Priority Compl...	Andy Burnham	British Gas	Stage 1: Casewor...	Assigned	Debt and...	PPM
EHU-01048-X1F7M	5/9/2023 8:19 PM	Failed	Priority Compl...	Esther Wang	Scottish Power	Stage 1: Casewor...	Assigned	Debt and...	Deb
EHU-01047-Z5V7W	5/9/2023 8:11 PM	In Progress	Priority Compl...	Mark Davies	SSE	Allocated To Sup...	Allocated To Supplier	Debt and...	PPM
EHU-01046-W7M...	5/9/2023 7:47 PM		Priority Compl...	Candice Varley	British Gas	New	New	Debt and...	PPM
EHU-01045-D7H0C	5/9/2023 7:43 PM	In Progress	Priority Compl...	Billie Topher	Utilita	Stage 1: Casewor...	Assigned	Prepaym...	Dela
EHU-01044-M2T1...	5/9/2023 4:44 PM	In Progress	Complaint	Alice Walker	Shell	Allocated To Sup...	Allocated To Supplier	Prepaym...	Diffi
EHU-01043-R3X0R	5/8/2023 3:19 AM		Complaint	Harriet Ross	Shell	New	New	Debt and...	Deb
EHU-01042-B8W1V	5/5/2023 5:53 PM	In Progress	Priority Compl...	Sarah Jones	SSE	Stage 1: Casewor...	Assigned	Debt and...	Vuln
EHU-01041-M2Q...	5/5/2023 5:45 PM		Priority Compl...	John Miller	Octopus	New	New	Metering ...	Met
EHU-01040-W8V4P	5/4/2023 9:25 PM	In Progress	Priority Compl...	Virginia Maxwell	Ovo Energy	Allocated To Sup...	Allocated To Supplier	Billing	Failu
EHU-01039-D7F8R	5/4/2023 9:20 PM	In Progress	Complaint	Clifford Johnson	Shell	Allocated To Sup...	Allocated To Supplier	Debt and...	PPM
EHU-01038-G3G7S	5/4/2023 9:11 PM	In Progress	Complaint	Joseph Wilkinson	E.On	Stage 1: Casewor...	Assigned	Metering ...	Met

Our solution: HelpFirst Score

The screenshot shows the Dynamics 365 EHU Complain Management System interface. The table displays a list of active cases with columns for Case Number, Date/Time, Priority, Case Type, Consumer Details, and Complaint Against. Four priority levels are highlighted with callouts: 1 (Immediate Priority), 2 (Today), 3 (Next 24 hours), and 4 (Low Priority).

Case Number	Date/Time	Priority	Case Type	Consumer Details	Complaint Against
EHU-01023-Q6XON		1 Immediate Priority	Priority Complaint	Dan Jones	ED
EHU-01020-R5T8P	5/3/2023 8:32 PM	2 Today	Complaint	Suzy Wells	Scottish Power
EHU-01001-L8R8B	5/3/2023 8:32 PM	2 Today	Complaint	Fatima Wallis	EDF
EHU-01001-L8R8B	5/3/2023 8:32 PM	2 Today	Complaint	Holly Turner	Boost
EHU-01001-L8R8B	5/3/2023 8:32 PM	2 Today	Priority Complaint	Cormac McBride	Shell
EHU-01001-L8R8B	5/3/2023 8:32 PM	2 Today	Complaint	Ray Robertson	Ovo Energy
EHU-01001-L8R8B	5/3/2023 8:32 PM	2 Today	Complaint	Ray Robertson	Utilita
EHU-01001-L8R8B	5/3/2023 8:32 PM	2 Today	Complaint	Ray Robertson	SSE
EHU-01001-L8R8B	5/3/2023 8:32 PM	3 Next 24 hours	Complaint	Ray Robertson	Shell
EHU-01001-L8R8B	5/3/2023 8:32 PM	3 Next 24 hours	Complaint	Ray Robertson	Utilita
EHU-01001-L8R8B	5/3/2023 8:32 PM	3 Next 24 hours	Complaint	Ray Robertson	Ovo Energy
EHU-01001-L8R8B	5/3/2023 8:32 PM	3 Next 24 hours	Complaint	Seren Huffman	Shell
EHU-01001-L8R8B	5/3/2023 8:32 PM	3 Next 24 hours	Complaint	Morgan Perry	Shell
EHU-01001-L8R8B	5/3/2023 8:32 PM	4 Low Priority	Complaint	Angela Hanna	Boost
EHU-01001-L8R8B	5/3/2023 8:32 PM	4 Low Priority	Priority Complaint	Chelsey Turner	Ovo Energy
EHU-01001-L8R8B	5/3/2023 8:32 PM	4 Low Priority	Complaint	Joao Velasquez	Boost
EHU-01001-L8R8B	5/3/2023 8:32 PM	4 Low Priority	Complaint	Eliza Raes	Ovo Energy
EHU-01001-L8R8B	5/3/2023 8:32 PM	4 Low Priority	Complaint	Hayley Smith	Shell
EHU-01001-L8R8B	5/3/2023 8:32 PM	4 Low Priority	Priority Complaint	Ron Dean	

Risk Alerts

1 Immediate Priority

Refrigerator required for son's insulin

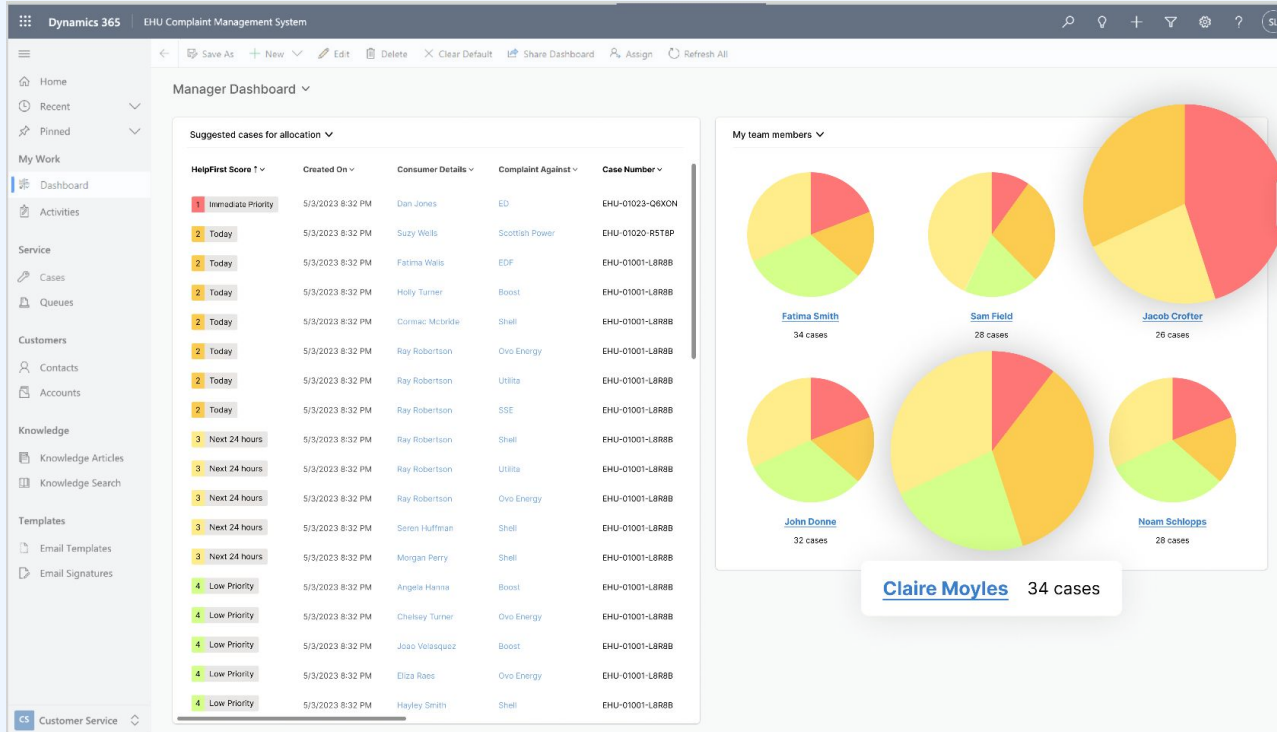
Case ID: EHU-01023-Q6X0N
Case Type: Complaint
Urgency: Normal
Created On: 5/3/2023 8:32 PM
Stage 1: Caseworker
Allocated To Supplier

Equip
Family
Health
Financial

Timeline
Created on: 5/5/2023 5:48 PM
Note modified by R Side Labs
Referral
C said he put £50 on the electricity meter yesterday. Showing £2 credit toda...
5/5/2023 5:48 PM
View more

GDPR Compliance
GDPR Compliant To Refer Case? Yes
GDPR Compliant Including Special Categories? Yes
Category* Metering (general)
Category Code*

Supervisor view



We need your help!

Could we arrange a 30-minute call? Questions to explore include:

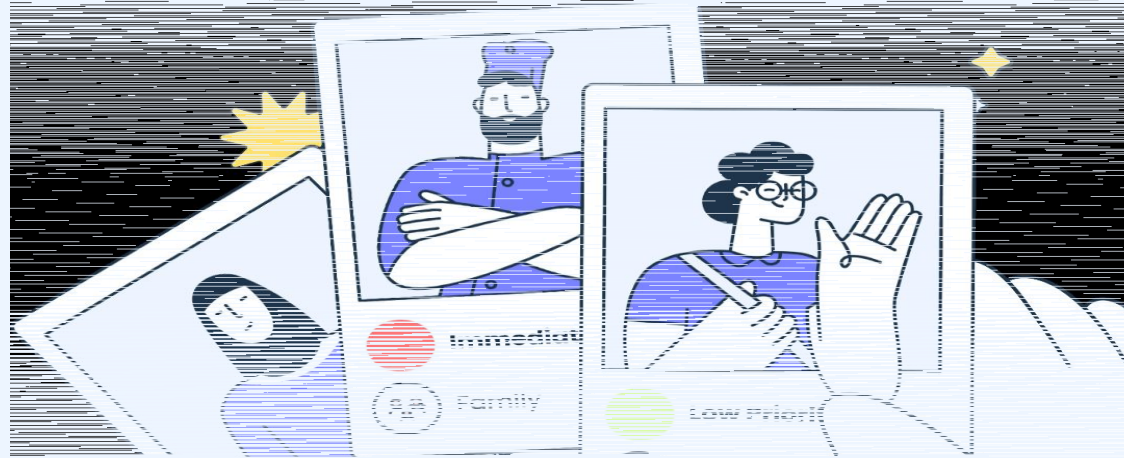
- How do you deal with vulnerability?
- What are the pros and cons of your approach to vulnerability tracking?
- What keeps you awake at night?

(Anonymised version of findings will be shared with all participants)



Thank you

✉ andy@helpfirst.ai



**Initiatives regarding
challenging client
behaviour and the
impact on adviser
mental health.**

**citizens
advice**

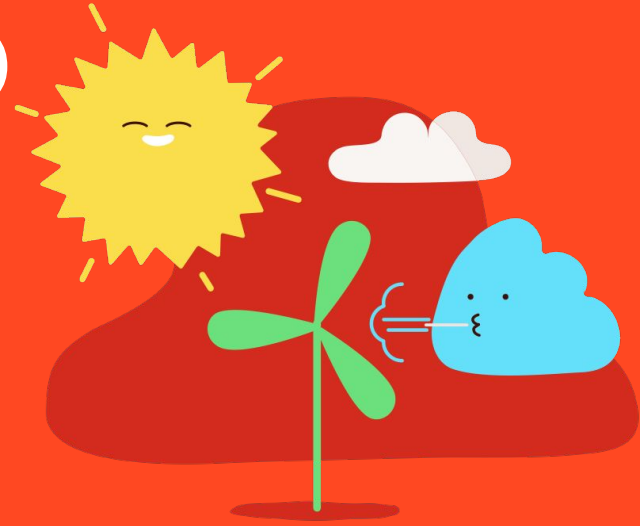
Lightning talks



Mind Partnership

Supporting our people in
handling challenging contacts

5th September 2023| V1.00



Supporting our customers and people

Sometimes when working in a call centre environment customers behave in a way that makes it hard for us to be at our best and challenging for our people to deal with. Behaviours can include:

- A customer being upset or angry
- Lonely customers
- Customers with a risk to life
- Customers in distressing personal situations

Upset or Angry Customers

All our Energy Specialists are receive training on handling challenging conversations, how to remain calm and to support customers.

We won't tolerate threats of violence, sexual harassment, racism, sexism or homophobia.

We'll give a warning and advise the contact may be ended if their behaviour continues and a manager may follow up to provide feedback to the customer.

We'll consider if the customer has a mental health issue/disability that makes it difficult for them to communication their needs clearly and appropriately and consider reasonable adjustment.

We may limit contact channels, such as email only unless in an emergency, limit contact to a particular person, or via a 3rd party and in severe cases we may pass the details to the police for further investigation.

Customers in difficult situations

Often when we're understanding circumstances, particularly around affordability vulnerability customers will share extremely difficult situations and handling these contacts can take a toll.

One call might need us to be the light in the night for a vulnerable customer, the next could be a lonely customer who hasn't seen family or friends for a while and wants a good natter and some company.

All of our teams are assigned a specific customer base, so our customers are more likely to speak to the same teams which helps build relationships and we can get to know those customers who call to chat regularly.

We'll allow time after a call for our people to take a break, compose themselves or talk to a colleague or manager or see support from our mental health champions.

We offer an Employee Assistance Programme, which is a 24/7 phone line with immediate emotional support.

Where there is an immediate risk to life and the customer is alone we'll contact 101 and ask the police to do a 'safe and well check'.

Mind Partnership

E.ON Next work closely with Mind, it's our nominated charity chosen by our people.

We're creating a culture in which everyone can be themselves and feel supported.

We have developed training material, working with Mind, to support our managers in recognising mental health problems and supporting our people through it, this can be from their own personal situations, to recognising and supporting customers with a mental health situation and signposting support, or support their teams after dealing with a challenging customer call.

We have over 100 "Wellbeing Warriors" supporting colleagues and the business with mental health and wellbeing

"Time to Talk" sessions cover a vast range of topics from general wellbeing conversations through to bereavement and diversity.



Managing Challenging Callers



OBJECTIVES

Duty of care towards agents taking calls.

Tailor support to more vulnerable customers.

Use technology to understand underlying motivations and respond accordingly.

Glean hard data which can then be used to target operational plans and support to those who need it most.

AI TRANSCRIPTION

The screenshot displays a chat interface with a light blue header. On the right side of the header, there is a 'Confidence Level' indicator with a yellow circle and a horizontal line. The chat history consists of several messages:

- AN** Okay how can I help
- AN** You
- AN** I that sounds frustrating
- AN** Can you give me some more details What is it that they're billing you for
- AN** I can imagine and I'm sorry to hear how much it's upsetting you
- AN** What I can do is

The user's responses are shown in white boxes with a yellow 'CU' label on the right:

- I'm sick to the back teeth of dealing with my electricity supply
So I moved into my property in December and they
Keep sending me bills that I don't owe
- Who ever lived here before me Which them money and they are
sending me bills for it
- I have tried to call them umpteen times and they just fob me off
- Now I'm getting letters with bloody a big red letters saying final
demand
- And it's really triggering my anxiety

A yellow play button icon is visible on the left side of the interface, and a yellow horizontal line highlights the user's response about the 'final demand' letter.

AI transcribes call in real time and then analyses it, flagging notable elements.

Keywords can be programmed that send an alert when flagged.





Adaptive AI learns through experience and exposure to accents and speech patterns.

DISCOURSE FLAGS

Positive elements also flagged for quality and training purposes.

AI detects negative CX and flags to a senior member of the team who is monitoring and can respond accordingly.

Top Categories:

-  Employee Greeting Welcome
-  Emotion Anger
-  Emotion Annoyed
-  Emotion Confused

ADVANTAGES

1

Monitoring in real time when trigger words are used.

2

Reporting allows for detailed trend analysis.

3

Cases requiring further action (i.e. follow-up calls) can be automatically flagged and passed into the relevant workflow.

4

Adaptive trigger word system allows us to track new trends as they emerge.



Thanks!





Energy Ombudsman

Domestic Supplier Liaison Meeting

September 2023

Trust Alliance Group

Ombudsman Services Limited can now announce that it will be officially known as [Trust Alliance Group](#) (TAG) Limited. The change provides the business with a broader objective to support the trust agenda as well as the opportunity to develop diverse capabilities with a connected purpose, rather than only resolving disputes.

Trust Alliance Group is made up of several organisations, which includes the [Energy Ombudsman](#) and the [Communications Ombudsman](#). The two ombudsman entities will continue to provide the services in line with the relevant regulator's requirements (in this case OFGEM and OFCOM). Both will continue to focus on delivering a first class, independent and free service but will also pursue opportunities to support their sectors further, with value and efficiency being key drivers.

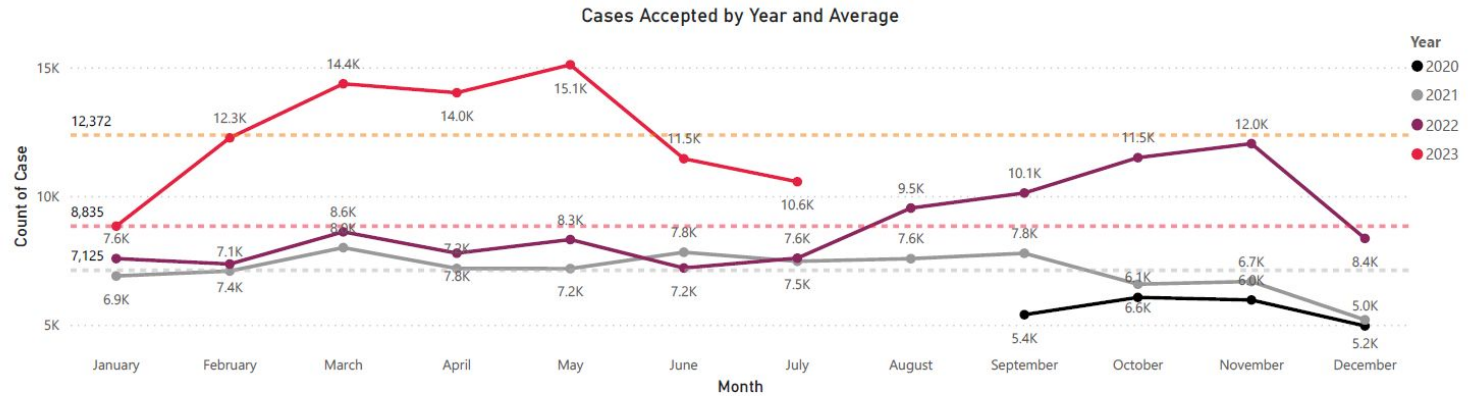
What this means for you?

- As of Monday 17th July, Ombudsman Services: Energy is now called the Energy Ombudsman
- All contact details across websites, bills and letters will need to be changed to reflect the new links and details
- There will be a period of transition to allow for participating companies to make the changes
- All participating companies are required to sign and return a new Deed Poll if not returned earlier this year

Industry Case Volumes

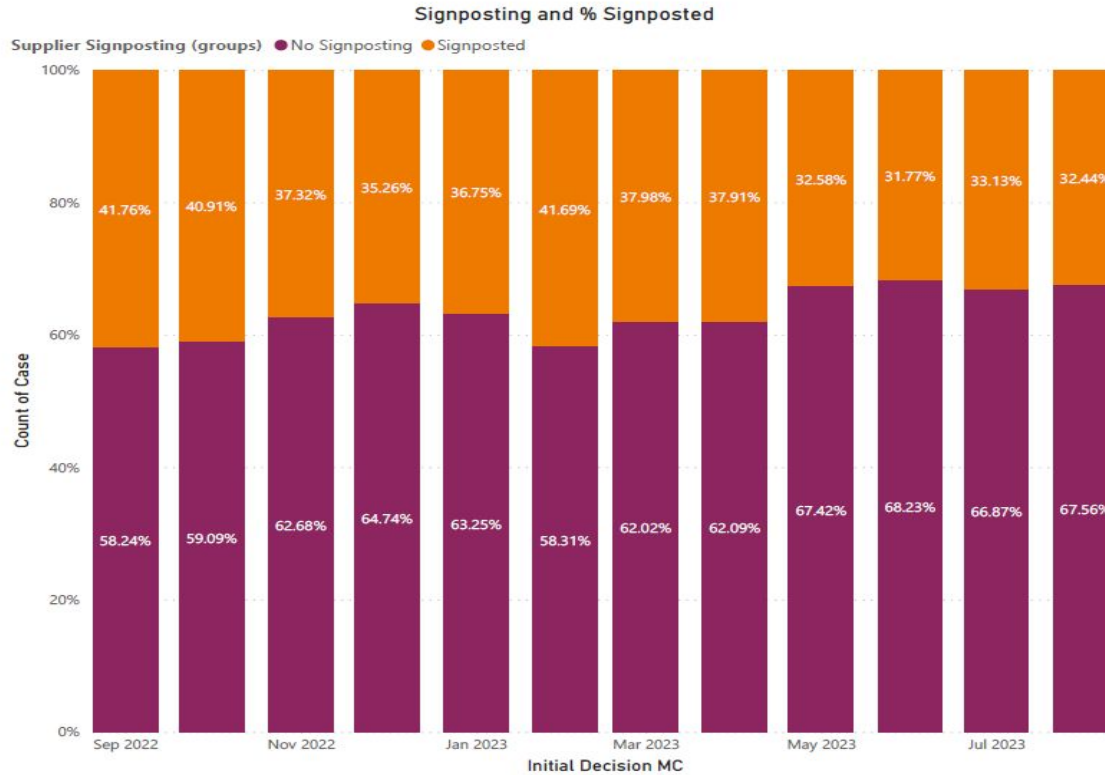
140.03

% Increase 2022-2023

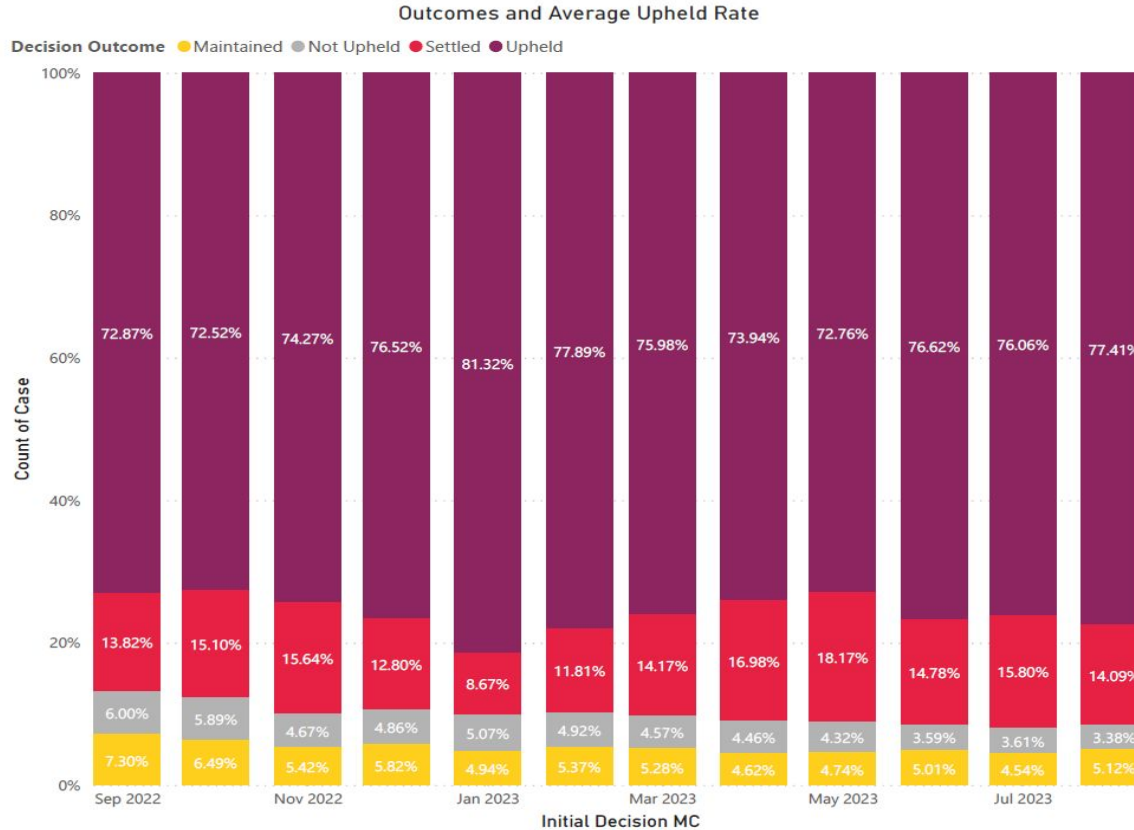


Year	January	February	March	April	May	June	July	August	September	October	November	December	Total
2020									5399	6070	5969	4963	22401
2021	6902	7093	8002	7194	7187	7822	7473	7573	7783	6583	6687	5199	85498
2022	7577	7365	8615	7786	8316	7212	7593	9538	10123	11496	12041	8361	106023
2023	8837	12265	14365	14016	15104	11456	10562						86605
Total	23316	26723	30982	28996	30607	26490	25628	17111	23305	24149	24697	18523	300527

Sector Signposting YTD



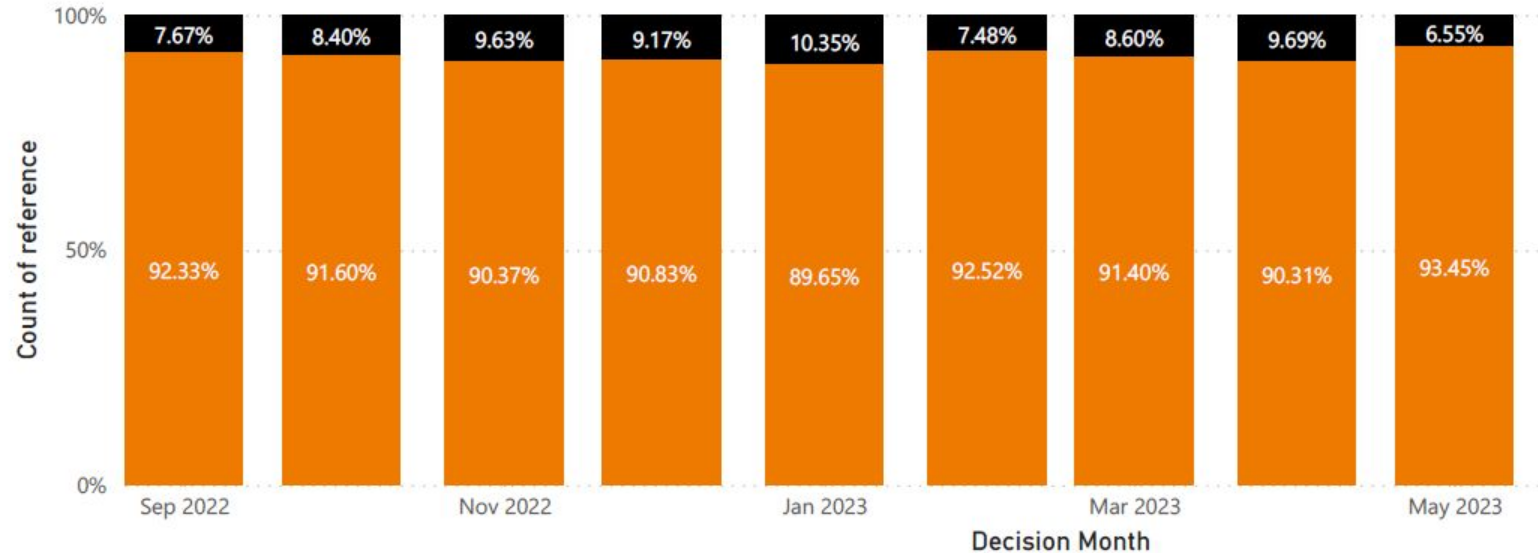
Outcomes & Average upheld rate

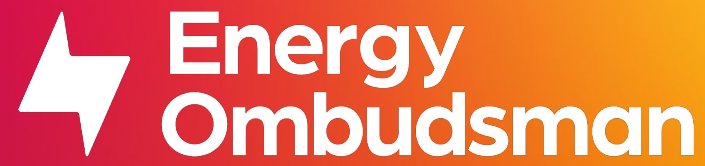


Overdue Decisions

Cases that went overdue by decision month

Task Activity ● Decisions ● Resolutions Overdue now closed





**Energy
Ombudsman**

Energy Team Update



Supplier Liaison Meeting
6th September 2023

Contents

1. Publications, blogs and consultation responses
2. Team updates
 - Energy Retail Markets
 - Net Zero Homes
 - Energy Network and Systems

Recent publications

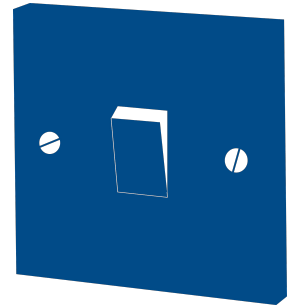
[Closing the gap: How to improve customer support in essential services](#)

[Winter Warning: The urgent case for energy bill support this winter](#)

[A flexible future: extending the benefits of energy flexibility to more people](#)

[Powering up participation: A guide to making smart energy technology more inclusive](#)

[Best practice guide: A guide on engaging local communities in the development of Local Area Energy Plans \(LAEPs\)](#)



Recent publications

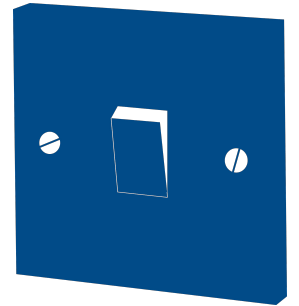
[Home advantage: Unlocking the benefits of energy efficiency](#)

[Future fantastic? Remaking an energy supply market that's fit for the future](#)

[Close to home: How to engage local communities in the development of Local Area Energy Plans \(LAEPs\)](#)

[It's all about location - Will changing the way we price electricity deliver for consumers?](#)

[Decarbonisation Dashboard](#)



Recent Blogs

- [No more room for uncertainty in the pursuit of Net Zero](#)
- [The energy price cap has dropped, but the crisis will be with us for some time](#)
- [Is increasing energy supplier profits really the answer to poor customer experiences and an affordability crisis?](#)
- [3 reasons why we need better energy efficiency standards in the private rented sector](#)

Consultation Responses

- We have responded to Ofgem's consultation on proposals to modify arrangements for the Over-Recovery of Allowed Revenue, Housekeeping changes to the Licence and the Baseline Margin Indexation change for the Data Communications Company, to Ofgem's Statutory Consultation - Consumer standards, and Ofgem's statutory consultation on introducing an allowance for bad debt associated with Additional Support Credit in the retail price cap.
- We have also responded to the Statutory Consultation - Involuntary PPM, to the MCS redevelopment consultation, and to the Ofgem statutory consultation on amending the methodology for setting the allowance for supplier profit margin in the retail price cap.
- We have also published the Decision Document on Revised Methodology for the Citizens Advice Star Rating.

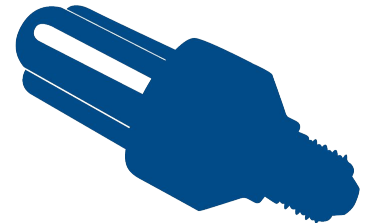
Consultation Responses

- We've responded to the [Ofgem call for evidence around the levelisation of payment method cost differentials](#), to [DESNZ's consultation on Community Benefits for Electricity Transmission Network Infrastructure](#), and to [Ofgem's consultation on a framework for consumer standards and policy options to address priority customer service issues](#).
- We've also responded to [Ofgem's Statutory Consultation to modify the Price Control Financial Instruments and Licence conditions for Gas Transmission, Gas Distribution and Electricity Transmission](#) and to [Ofgem's consultation on frameworks for future systems and network regulation](#).
- See all our consultation responses [here](#).

Energy Retail Markets Team: updates

Current policy/advocacy work

- Recently published [Winter Warning](#), calling for targeted energy bill support ahead of the coming winter
- Published [Closing the Gap](#), on improving customer support through the PSR and other methods
- Responded to Ofgem's statutory consultations on [Involuntary PPMs](#) and [Customer Service Standards](#)
- Our [Unequal Crisis](#) and [Numbers behind the stories](#) blog series continue, with domestic energy featuring heavily in the cost of living crisis



Net Zero Homes: updates

Current policy/advocacy work

- Published [A flexible future](#) report on removing barriers to energy flexibility, accompanied by [Powering up participation](#), a guide to making smart energy technology more inclusive.
- Held a webinar discussing the new [Close to home](#) report on local area energy planning.
- Published [Home advantage](#) research on the benefits of improving energy efficiency.
- Created a [decarbonisation dashboard](#) of constituency-level data on the costs and benefits of net zero.

Coming soon

- Roundtables based on previous [Demand: Net zero](#) work (September)
- Research on consumer protections for net zero changes (September)



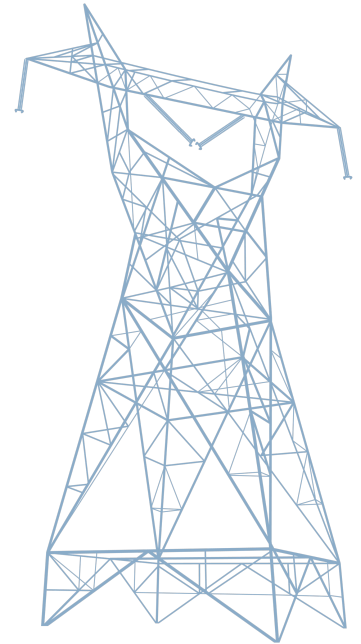
Energy Networks & Systems Team: updates

Current policy/advocacy work

- The second in a series of [discussion papers](#) on the potential consumer impact of the government's Review of Electricity Market Arrangements (REMA) - focussing on Locational Pricing.
- Responded to Ofgem [consultations](#) including regarding DCC funding and Community Benefits related to Transmission Infrastructure investment.

Coming soon

- Publishing research into the network costs arising from various heat decarbonisation options
- Further consideration of industry code reform options, including the appropriate role for Citizens Advice



AOB

citizens
advice