

Meeting note

13:30pm – 15:00pm, Wednesday, 27 March 2024
via Microsoft Teams

B-MeX workshop with Wholesalers – meeting note

This note provides a summary of the key points discussed with wholesalers, during the B-MeX workshop meeting which took place on Wednesday, 27 March 2024. We have not in this note referenced names or companies against opinions or views expressed.

The topics for discussion were B-MeX and wholesaler sample data quality, including "Reasons for contact". The accompanying slides on our website [here](#) provide further details regarding the topics discussed during the workshop.

Participants

Organisation	Participant
Ofwat	Shan Kent
	Mirena Hadzhigenov
MOSL	Samantha Webb
Wholesalers	
AFW	Matthew Turner
ANH	Matthew Garfield
NES	Angela Brown, Mark Wilkinson
SES	Julie-Ann Anderson
SEW	Michelle Marvell
SRN	Martin Pope
SSC	Mary Porter-Chorley
SWB	Ryan Simmons
TMS	Gerard Lyden
UUW	Ian Johnson
WSX	Sean Larkin
YKY	Kate Russell

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Overview of B-MeX workshop

Ofwat commenced by outlining the aims and agenda for the session. Ofwat reiterated the importance of importance of good quality direct customer contact sample data from wholesalers for successful telephone interviews and higher response rate in the shadow run of the B-MeX survey. Ofwat then outlined a summary of the Research agent IFF's findings regarding the wholesalers' direct customer contact sample provided during the pilot work and what it highlighted regarding the need for high quality sample. IFF results noted in particular that, of the raw sample of 15,825 direct contacts (relating to contacts over the period 18th September to 18th October 2023), only around half (54%) was usable in terms of providing enough detail for IFF to telephone the contact. Ofwat also highlighted IFF findings that, of the usable sample, about half (42%) were 'poor' records as they had an unclear reason for contact or either no named contact or company name on the sample. Ofwat stressed the need to move away from 'poor' records in the Shadow period.

Ofwat provided a summary of the IFF's Recommendations and Guidance for the Shadow Period regarding data quality. Details could be found in the accompanying slide pack alongside the link to this meeting note on Ofwat's BR-MeX webpage [here](#).

Summary of group discussion

Comments on IFF's findings on sample quality

- **Success rate** - One Wholesaler inquired whether the success rate in B-MeX pilot survey could be compared with C-MeX. Ofwat will confirm this in due course but noted IFF's considerations that improved sample data quality will result in a better response rate in the Shadow period. Another Wholesaler pointed out that conducting a comparison at this stage might not be fully relevant since the B-MeX pilot work involved a time delay in providing samples and conducting actual interviews for the B-MeX pilot surveys, which is not applicable to the C-MeX surveys.

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- **Usable sample** - One Wholesaler asked for IFF's findings on Wholesaler customer contact sample from pilot work to also be presented excluding the one Wholesaler that skew the overall sample data. Ofwat confirmed that this will be included in the IFF's Final Report from the BR-MeX pilot.
- **Duplicated records** - One Wholesaler had a question on the nature of duplicated records excluded from the usable sample. Ofwat confirmed that those records relate to duplicated data items, not repeated contact for the same issue. Another wholesaler inquired about the handling of duplications for large business customers that interact with multiple wholesalers across different regions, where the same contact may appear in various sample sets provided by different wholesalers. They raised concerns about whether these contacts would be double-surveyed or excluded, as multiple surveys could fatigue the customers and potentially impact the score. Ofwat will confirm this methodological point in due course.
- **WaSCs and WoCs** - Another wholesaler inquired about the clarity during interviews regarding the distinction between water and wastewater services. They questioned whether agents ensure differentiation between the two, particularly in cases where wastewater services are provided by different wholesalers, such as water-only companies (WoCs) and water and sewerage companies (WaSCs). This clarification ensures accurate customer feedback regarding the appropriate wholesaler. Ofwat noted that these data ought to be available in the sample, but it will consider whether some updates to the interviewer briefing protocol may be helpful to ensure that this differentiation is clearly explained to the interviewee.

Comments on Recommendation 1 on exclusions / all ineligible contacts should be removed from direct customer contact sample

- One Wholesaler raised the need for clarification that wholesalers should provide data for all business customer contacts about "non-household location", noting cases of passer-by member of the public that report an issue, but have no direct relationship with the business premises. The Wholesaler pointed out that we need to avoid the same issue being simultaneously captured under both C-MeX and B-MeX. Ofwat to clarify

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this. Ofwat will also Ofwat cross check and align approach to exclusions with C-MeX, where possible.

- No other major comments or concerns were expressed in regard to Recommendation 1.

Comments on Recommendation 2 and 3 on sample record requirements and essential data

- Wholesalers requested clarification regarding the data field "Contact_Outcome," specifically inquiring whether the status "resolved" should indicate the point in time when the telephone call with the customer ends or when the sample data is sent over. They noted instances where cases not resolved at the call's end might be resolved before the data sample is dispatched. Ofwat indicated that this refers to the point in time when the contact between the customer and wholesaler in question ends, but pointed out that there is a latitude of understanding as this point is also verified and confirmed with the customer during interviews. Ofwat will take this point away for further consideration.
- One Wholesaler broadly expressed concerns with having to record data in the data field "Contact_Outcome", noting that this requirement would require system and process changes from their side, questioning the added value of this data field.
- A Wholesaler inquired whether they should leave data fields empty when a customer declines to provide information, such as their name or telephone number. Ofwat confirmed that in such cases the wholesaler should record in the customer contact sample record that the customer 'Refused'. Further details on this matter will be assessed and provided by Ofwat in due course.
- Several Wholesalers requested clarification regarding the necessity of recording both the contact's name and business name, questioning whether obtaining both is contingent upon the customer's preference to provide such information. Ofwat clarified that if a customer refused to give their contact's name field, the wholesaler should populate the business name field.
- Some Wholesalers expressed concerns regarding potential discrepancies between wholesalers and customer interpretations of the timing of issue

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resolution, particularly when issues are anticipated to lead to bill adjustments or payments. Ofwat pointed out that having both perspectives would be helpful. One Wholesaler suggested that Ofwat is explicitly clear in future Guidance that this is a direct contact at the time of a call end from the Wholesaler's perspective to avoid mixing with indirect contact interpretation.

- In addition, to the comment above on data fields that must be populated, one Wholesaler remarked on another field, "Contact_Jobrole," highlighting that implementing it would necessitate additional investments in system changes. However, they expressed uncertainty regarding the added value and necessity of this field. Ofwat will take this remark away for further considerations.
- Other wholesalers also articulated concerns regarding process-based implications, emphasising the necessity for additional changes to their systems. They pointed out that each wholesaler's system is unique, and the data requirements will necessitate varying adjustments for different wholesalers.

Views on Code fields

- One wholesaler requested clarification on whether data fields should be coded with a code or a label, highlighting their use of labels for C-MeX. Other Wholesalers also emphasised the importance of consistency with C-MeX standards, as it would facilitate operations for their teams. Ofwat clarified that it has no strong views as long as all Wholesalers use a consistent approach.

Comments on Recommendation 4 on Primary reason for contact

- Wholesalers overall broadly agreed with the categories used by IFF. Some Wholesalers have already grouped the types of contact they receive in the categories for primary contact list of categories and consider that the list captures well the reasons for contact. Some specific views included:
 - Some comments from Wholesalers included that there is a need for more granular split of the "wastewater" category and the

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- "infrastructure" category, as well as an explanation on what sits behind some categories such as "location and boundaries".
- Some Wholesalers pointed out the risk of double counting "meter issues" as they are often referring the customers to Retailers as often customer consider bills shocks as metering issues, for example. In these cases, these issues are raised as a bilateral contact (i.e. it will be captured as part of the indirect sample). Wholesalers asked that meter issues are excluded from the direct sample.
 - Wholesalers also noted that their various customer management systems generate many different reasons for contact. Some also noted that they already in their systems capture reasons for contact below 'primary reason' recorded for C-MeX purposes.
 - Overall Wholesalers agreed that a practical approach regarding the need for the direct customer contact sample set to contain a pragmatic and tractable set of primary reason for contact would be as follows:
 - Wholesalers to consider the set of primary reasons for contact for NHH customers that their own customer management systems generate.
 - Wholesalers to collaborate on drawing up a candidate set of primary reasons for contact that:
 - Strikes a balance between representing the variety of reasons for contact and the need for a manageable and not too long list of categories.
 - Enables population of this set of categories from wholesalers' existing customer management systems, including where appropriate reasons recorded under the primary reason for C-MeX purposes.
 - Wholesalers to provide views and suggestions for a final version of the lists, or options for lists, which would work for all Wholesalers.

Comments on Recommendation 5 on secondary / supporting reason for contact

- Some Wholesalers disagree that the text / categories used in this field should avoid using numeric codes, industry/company jargon etc, noting

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that these notes and explanation are essential for the contact person to send to the people that will be undertaking the job/action on field.

- Ofwat tasked the Wholesalers to come up with a workable set of categories on secondary / supporting reason for contact.

Other considerations:

- One Wholesaler asked if Ofwat will provide more detailed outcomes on the indirect contacts. Ofwat confirmed that further details will be included in the IFF's Final Report from the BR-MeX Pilot stage.
- One Wholesaler inquired about the timing of the first submission of sample data for the Shadow period and whether subsequent submissions should occur monthly. Ofwat indicated that we are presently working on the basis that the first sample should be provided by the end of May 2024 and thereafter on a monthly basis starting from June.

Next steps:

- IFF's Final Report for the BR-MeX Pilot and Guidance document for the Shadow period will be published shortly.
- Ofwat took away various points for further considerations as indicated above, including cross-checks for consistency with C-MeX.
- Wholesalers agreed to look at the categories for primary reasons for contact and for secondary / supporting reason for contact to come up with consistent and workable set of categories. Wholesalers to present their views, suggestions and consideration during another workshop towards the end of April 2024.