

Helping customers that need extra support

Our Customer Vulnerability Strategy

Appendix B – Customer Summary



from
Southern
Water® 



No.	Service for all minimum expectations	Compliance	Our Services	Our monitoring	Our Challenges	Our Goals
1.1	<p>Companies should adapt their services to customers in line with any known extra help needs. This is especially important during times where there is increased risk of harm; for example, during incidents.</p>	Compliant	<ul style="list-style-type: none"> We provide various methods of communications, including; <ul style="list-style-type: none"> - Text messaging services - Video triage - Language interpretation - What'sApp - Webforms - Webchat - Phone - Recite Me - Email Our website provides up to date incident data We have a designated incident process for Dialysis patients in supply outages to ensure they remain in supply. 	<ul style="list-style-type: none"> We monitor insight data from customers who require extra help We test our resilience through our emergency and resilience team who routinely run scenarios to test our preparedness during an incident. We complete comprehensive debriefs post incident to identify learning opportunities and improve our service. 	<ul style="list-style-type: none"> Increasing numbers of priority service customers means delivering bottled water to all during a supply outage will become increasingly difficult. 	<ul style="list-style-type: none"> To ensure all customers requiring bottled water receive this in the first 24 hours. To improve the percentage of customer satisfaction for those on our priority service register from 70% to 75% by 2030.
1.2	<p>Companies should ensure that the level and nature of support available to customers is presented in a way customers can understand.</p>	Compliant	<ul style="list-style-type: none"> Our website features comprehensive information on our support services including; <ul style="list-style-type: none"> - Hardship Fund, - Information on our priority services register - Support tariff's We use plain English across all communication platforms. We provide alternative communication methods including; <ul style="list-style-type: none"> - Braille - Talking bills - Large Print - Audio Bills Our information leaflets are available in various commonly spoken languages. We host 'Your Water Matters' drop in sessions for face to face opportunities to discuss help and support. 	<ul style="list-style-type: none"> We ensure the information on our website is clear and accessible by tracking web-site traffic and customer Insight. We monitor usage statistics for our alternative communication methods. We measure customer satisfaction through our priority service Satisfaction score. 	<ul style="list-style-type: none"> Ensuring all information remains current and high accessibility standards are maintained. Providing equitable services across diverse cultural and linguistic groups. 	<ul style="list-style-type: none"> To maintain our BSI accreditation and improve our services year on year. To increase awareness of the services offered for the priority services register. Increase support via our priority services register by 5% from 15% to 20% of our households by 2030. To improve the percentage of customer satisfaction for those on our priority service register from 70% to 75% by 2030.

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1.3	Companies should seek to continuously improve the service they provide to customers who need extra help. This may include finding innovative ways to design or implement services.	Compliant	<ul style="list-style-type: none"> • We utilise a capability tool to conduct gap analysis and identify improvements. • We conduct regular insights with our customers to understand the relevance of support offered. • Our Field Officers identify ways to support our customers through charity engagements, community events and subject matter experts. 	<ul style="list-style-type: none"> • We utilise a capability tool to conduct gap analysis. • We use customer insights to measure the impact of identified gaps and improvements. • Improvements will be tracked as part of our vulnerability strategy with progress monitored by our monthly Executive Performance Committee. 	<ul style="list-style-type: none"> • Integrating customer feedback into actionable changes. • Maintaining a consistent process for gathering insights. 	<ul style="list-style-type: none"> • To ensure services remain relevant for our customers. • To improve the percentage of customer satisfaction for those on our priority services register from 70% to 75% by 2030.
1.4	Companies should use a range of data to monitor the effectiveness of their extra help services, and the satisfaction levels of customers who have made such needs known	Compliant	<ul style="list-style-type: none"> • We monitor the number of customers utilising additional support such as our priority services register and support tariff's. • We utilise Insights from our customers to understand the impact of these services. • We use external research companies and customer focus panels to understand the effectiveness of support provided. 	<ul style="list-style-type: none"> • We track and record the volume of customers supported through all of our support tariffs. • We track the effectiveness of financial assistance provided through all of our support tariffs. • We track, record and report the number of people on our priority services register <ul style="list-style-type: none"> • We monitor and report and our common performance commitment targets for staying in touch with customers receiving priority support. • We measure customer satisfaction through our priority service Satisfaction score. 	<ul style="list-style-type: none"> • Customer satisfaction scores can be impacted by reputational fluctuations. 	<ul style="list-style-type: none"> • To increase the number of people supported by discounted tariffs. • To improve the percentage of customer satisfaction for those on our priority service register from 70% to 75% by 2030. • To increase the number of customers supported by our priority services register from 15% to 20% by 2030. • To improve the percentage of customer satisfaction for those on our priority service register from 70% to 75% by 2030. • To maintain our Common performance commitments targets of 35% for actual contact and 90% for attempted contact.

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2.1	Companies should interact with customers in a way that is inclusive for a diverse range of audiences. This should be underpinned by relevant insights, which may include research, engagement and accreditation.	Exceeding	<ul style="list-style-type: none"> • We achieved accreditation for BSI ISO 22458 International kitemark for inclusive services without any minor or major non- conformities. • Our website exceeds AA standards of accessibility expected for this certification. • We utilise customer insights and external research to understand inclusivity requirements. 	<ul style="list-style-type: none"> • We will be audited annually on our accessibility by the British Standards Institute. 	<ul style="list-style-type: none"> • Ensuring the diverse needs of our customers is maintained in a continuously evolving environment. 	<ul style="list-style-type: none"> • To maintain our BSI accreditation and improve our services year on year. • To improve the percentage of customer satisfaction for those on our priority service register from 70% to 75% by 2030. • To increase the number of customers who feel Southern Water supports their particular needs in relation to their water/waste water services from 63% to 75% by 2030.
2.2	Companies should offer their customers a range of ways to interact and communicate. This includes allowing customers to opt for third party billing where appropriate.	Compliant	<ul style="list-style-type: none"> • We provide various methods of communications, including; text messaging services <ul style="list-style-type: none"> - Video triage - Language interpretation - What'sApp - Webforms - Webchat - Phone - Recite Me - Email • We operate a third party representative Policy for customers who may have limited capacity or temporary impairments. Including Power of attorney service and 3rd party billing. 	<ul style="list-style-type: none"> • Our policies are reviewed annually to ensure relevance. • We will be audited annually by the British Standards Institution. • We undertake quality assurance on customer interactions. 	<ul style="list-style-type: none"> • Ensuring consistency of recording interactions and responses for customers choosing to interact in various formats. 	<ul style="list-style-type: none"> • For all customer interactions to be recorded and accessible by all required users. • To maintain our BSI accreditation and improve our services year on year.

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2.3	Companies should consult with CCW, and engage with stakeholders and other customer representatives, when making significant changes to their proposed service offering around vulnerability.	Compliant	<ul style="list-style-type: none"> • We engage with CCW via consultations, feedback requests and proactive workshop attendance when proposing significant changes. • We utilise customer insights for future plans and changes • We utilise challenge groups and online panels to obtain feedback for future plans and changes. 	<ul style="list-style-type: none"> • We measure engagement with CCW and subject matter experts by the frequency and outcomes of interactions. • Proposed changes and outcomes will be reviewed and tracked as part of the vulnerability strategy by the monthly Executive performance committee. • We use customer insights to measure the impact of changes to services offered. 	<ul style="list-style-type: none"> • Co-ordinating with multiple stakeholders and implementing expert recommendations will need to be managed carefully through our strategic framework to ensure suitability of services. 	<ul style="list-style-type: none"> • To design service offerings based on customer insight and CCW approval. • To improve the percentage of customer satisfaction for those on our priority service register from 70% to 75% by 2030.
3.1	Companies should take active steps to identify customers who require extra help who have not yet been identified.	Compliant	<ul style="list-style-type: none"> • We undertake strategic partnership engagement to help identify new customers. • We participate in active data sharing agreements with charities and utility partners. • We proactively seek new data share agreements to increase our reach. • Our field agents proactively seek out opportunities to promote our services and identify new customers who require extra help. 	<ul style="list-style-type: none"> • The number of community engagements are tracked with volumes of interaction recorded. • Data sharing agreements volumes are recorded for effectiveness. • Partnership effectiveness is monitored via regular reporting. 	<ul style="list-style-type: none"> • GDPR presents significant challenges when engaging in data share agreements. • Balancing customer reach vs customer volume when engaging in outreach work. 	<ul style="list-style-type: none"> • To increase the number of customers supported on our Essentials tariff to 182,000 by 2030. • Increase support via our priority services register by 5% from 15% to 20% of our households by 2030.

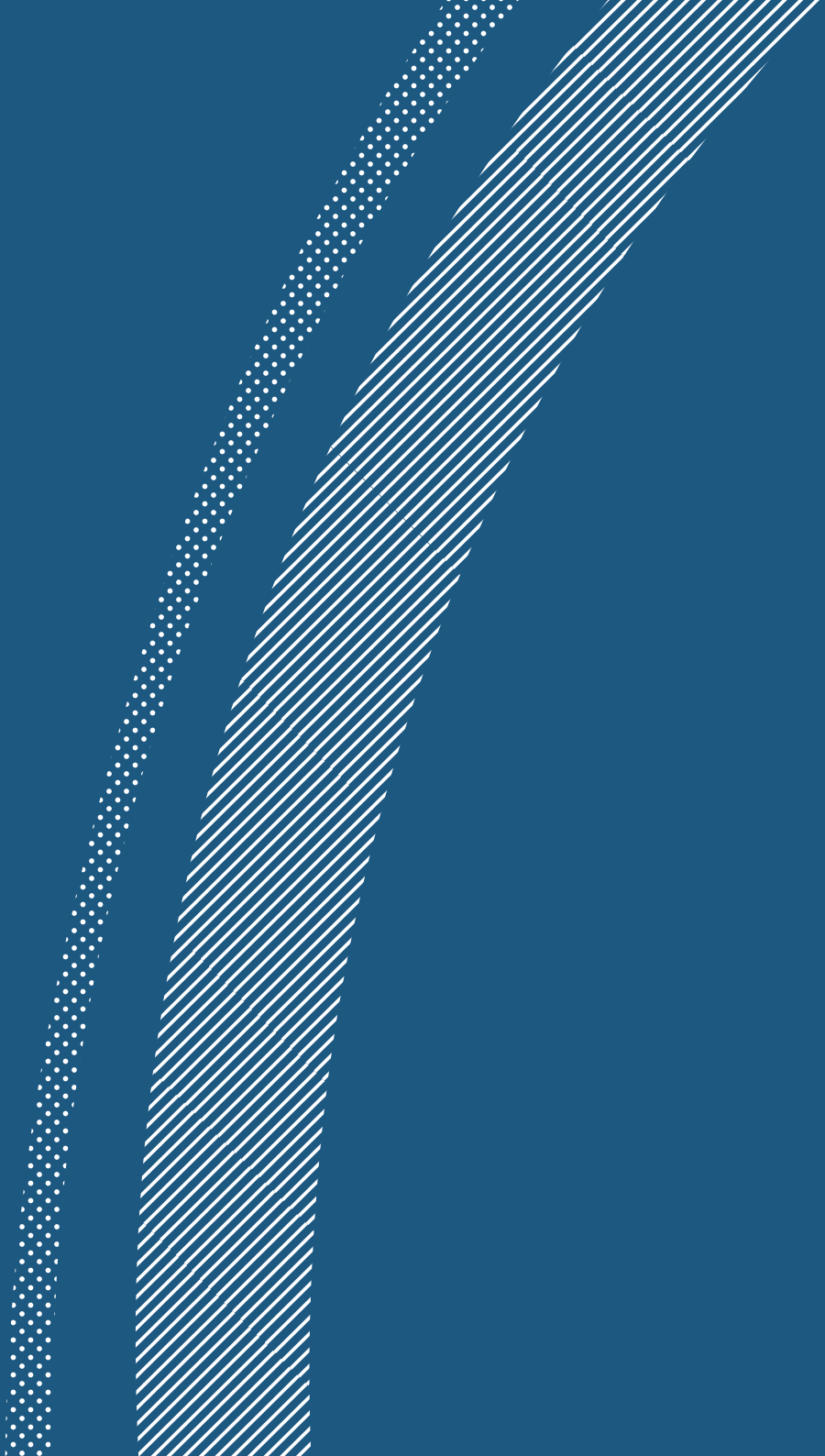
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3.2	Companies should take steps to proactively increase customer awareness of the extra help available to those who need it.	Compliant	<ul style="list-style-type: none"> • We utilise strategic partnership engagement to help raise awareness • Our vulnerability team proactively seek out opportunities to promote our services and identify new customers who require extra help. • We use our social media platform to highlight the support available. • Our local community events 'your Water Matters' aims to increase awareness of all service offered including vulnerability Services. 	<ul style="list-style-type: none"> • Awareness of our additional services are tracked via our customer insights and our priority services Satisfaction score. • Our action as part of our vulnerability strategy to improve awareness of the services offered will be monitored monthly by the Executive Performance Committee. 	<ul style="list-style-type: none"> • Improving customer engagement with communications will be key to raising awareness. A letter from Southern Water still being the preferred way to promote the priority services register. 	<ul style="list-style-type: none"> • To improve the percentage of customer satisfaction for those on our priority service register from 70% to 75% by 2030. • To increase the number of customers who feel Southern Water supports their particular needs in relation to their water/waste water services from 63% to 75% by 2030.
3.3	Companies should train their staff to spot potential requirements for extra help, even when a customer has not previously declared it.	Compliant	<ul style="list-style-type: none"> • Vulnerability and safeguarding training is provided to internal employees and contracted partners through internal policy training framework • Additional training is provided by external partners and stakeholders such as Kidney Care UK and Dementia Friends. 	<ul style="list-style-type: none"> • Internal policy training is monitored for compliance and frequency. • Additional training and it's requirements are monitored by our learning and development department and the vulnerability lead • We undertake quality assurance on customer interactions. • Employee insight measures suitability of the training provided enable agents to complete their work. 	<ul style="list-style-type: none"> • Training can quickly become outdated so requires regular reviews by our Learning and development team to ensure it remains fit for purpose. • Ensuring widespread understanding and compliance. 	<ul style="list-style-type: none"> • Internal policy training adherence to meet 100% where applicable. • Employee insight measures to record as favourable improving year on year.

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3.4	Companies should actively consider how they can reduce communication burdens on customers who need extra help; this could include establishing data sharing arrangements with partner organisations.	Compliant	<ul style="list-style-type: none"> • We participate in data sharing with energy companies for priority services registrations • We participate in data sharing with charities and Housing Associations for our social tariff. • We are looking to extend our data sharing capabilities to include local authorities. • We are looking into more streamlined digital processes to simplify communication journeys. • We have removed income and expenditure evidence requirements when enrolling for our social tariff. • Our field agents will enrol customers face to face at community events and engagements. 	<ul style="list-style-type: none"> • We monitor incoming contacts from customers enrolling on our priority service register. • We track and record the volume of customers supported through all of our support tariffs. • Effectiveness of our communication is tracked by our customer insights. • We measure customer satisfaction through our priority service Satisfaction score. 	<ul style="list-style-type: none"> • GDPR presents significant challenges when engaging in data share agreements. • Balancing customer reach vs customer volume when engaging in outreach work. 	<ul style="list-style-type: none"> • To increase the number of customers supported on our Essentials tariff to 182,000 by 2030. • Increase support via our priority services register by 5% from 15% to 20% of our households by 2030. • To actively participate in data share activities with local authorities to allow auto enrolment.
4.1	Companies should take appropriate steps to record customers' extra help needs. These records should be held securely and in line with wider data protection requirements.	Compliant	<ul style="list-style-type: none"> • We record extra help needs on our secure customer system. • We can easily identify a customer who requires extra help through flags on their accounts, and large letter prompts. • Access to our internal data system is restricted to approved users only to ensure data is only used for operational purposes. 	<ul style="list-style-type: none"> • System access must go through appropriate approval channels. • Internal quality reviews are performed to ensure colleagues are updating customers records accurately and GDPR is adhered to. 	<ul style="list-style-type: none"> • Ensuring data remains up to date and accurate for those who do not engage directly with Southern Water. • Recording customers specific requirements within extra needs requires manual work by colleagues. 	<ul style="list-style-type: none"> • To record additional services within extra help needs to allow colleagues to easily identify the level of support needed.

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4.2	Companies' records should be reviewed regularly to ensure they are up to date.	Compliant	<ul style="list-style-type: none"> • We observe Ofwat's common performance commitments for attempted contact with 90% and actual contact with 35% of our priority service register customers within 2 years of being on the register. • Customers contact details are checked as standard when telephone contact is made. • Priority service requirements are checked as standard when telephone contact is made. 	<ul style="list-style-type: none"> • We report annual performance measures to Ofwat. • Internal quality reviews are performed to ensure colleagues are checking and updating customers details where necessary. 	<ul style="list-style-type: none"> • Effectively reaching and engaging with vulnerable customers who may be difficult to contact. • Customers may be reluctant to share contact details. 	<ul style="list-style-type: none"> • To achieve 35% for actual contact with priority service register customers. • To achieve 90% for attempted contact with priority service register customers. • To improve the quality of data held on our internal customer system.
4.3	Companies should consider how their records of customers' needs can be designed in a way that can help deliver wider benefits to their customers; for example, reducing communication burdens for customers through data sharing.	Compliant	<ul style="list-style-type: none"> • We participate in data sharing with other utility companies to make sure our/ their priority services register is as comprehensive as possible. • We are looking to extend our data sharing capabilities to include local authorities. • We partner with Life Ledger Services to provide a one stop service for bereaved customers. • We use our customer extra need codes to help identify partnership opportunities. • We use our strategic framework to identify innovative ways to increase customer benefits. 	<ul style="list-style-type: none"> • We monitor outputs for data sharing agreements with our priority services register. • Volumes of Life Ledger services are recorded and reviewed on a monthly basis. • We utilise a capability tool to conduct gap analysis on our services. 	<ul style="list-style-type: none"> • Recording customers specific requirements within extra needs requires manual work by colleagues. • Identify additional services within extra support can be difficult. 	<ul style="list-style-type: none"> • To increase the number of customers supported on our Essentials tariff to 182,000 by 2030. • Increase support via our priority services register by 5% from 15% to 20% of our households by 2030. • To actively participate in data share activities with local authorities to allow auto enrolment. • To record additional services within extra help needs to allow further innovation with customer benefits.

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4.4	<p>In designing their approach to recording and, where relevant, sharing customer vulnerability data, companies should clearly explain to customers how their data will be used, including any choices available to them. Companies should take steps to understand how their customers who need extra help feel about the use of their data.</p>	Noncompliant	<ul style="list-style-type: none"> • Details of our privacy policy notice are on our website. • Details of how customers data will be used and the choices available to them is included in our privacy policy. • We have not sought feedback from our customers on how they feel about the data we share, and our privacy Policy. 	<ul style="list-style-type: none"> • We will conduct insights with customers, challenge groups and focus panels to obtain feedback. 	<ul style="list-style-type: none"> • Legal limitations, GDPR and data sharing could conflict with customer feedback. • Translating customer feedback into practical service improvements could be challenging. 	<ul style="list-style-type: none"> • To gain understanding of how our customers feel about the data we share and our privacy policy. • To use gained insight to improve communication and awareness of existing privacy policy.
5.1	<p>Companies should develop and maintain a vulnerability strategy setting out how they plan to support the extra help needs of their customer base.</p>	Compliant	<ul style="list-style-type: none"> • This has been completed and submitted to Ofwat on 30th June 2024 and published on our website from 1st July 2024. • Our draft strategy was presented to our Customer Challenge Group for Insight. 	<ul style="list-style-type: none"> • Progress of our strategy will be reviewed by the Executive Performance committee on a monthly basis. • Delivery of the strategy is the responsibility of our Chief Customer Officer. 	<ul style="list-style-type: none"> • Introduction of new priority services register standards after the Vulnerability Strategy has been submitted could mean changes to proposed actions. • Ensuring that any improvements are recorded and acted upon. • Ensuring any actions stay compliant with all relevant regulations and standards. 	<ul style="list-style-type: none"> • To deliver tailored support to customers requiring extra help. • To increase the number of customers supported on our Essentials tariff to 182,000 by 2030. • Increase support via our priority services register by 5% from 15% to 20% of our households by 2030. • Common performance commitments for contact with customers on the PSR for more than 2 years. 35% actual contact. 90% attempted contact. • Increase our priority services Satisfaction score from 70% to 75% by 2030. • Improve proportion of our customers who feel Southern Water meets their particular needs in relation to their water/wastewater service from 63% to 75%.

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5.2	Companies should take steps to understand the likely underlying requirements for extra help in their areas.	Compliant	<ul style="list-style-type: none"> • We utilise insight teams to engage with customers needing additional support. • We utilise partners such as Rural England, Kidney Care UK to identify customers extra help needs. • We utilise demographic data to identify customers extra help needs. • Our field agents have developed individual, statistical, knowledge based strategies to identify areas of need to target and deliver support. 	<ul style="list-style-type: none"> • We track and report demographic data to our Executive committee. • Field agents demographic engagement volumes are tracked and recorded. 	<ul style="list-style-type: none"> • Translating customer feedback into practical service improvements. • Balancing customer reach vs customer volume when engaging in outreach work. 	<ul style="list-style-type: none"> • To successfully identify trends in demographic data to identify areas to target support. • To successfully identify trends in demographic data to identify services to target support. • To increase the number of customers supported on our Essentials tariff to 182,000 by 2030. • Increase support via our priority services register by 5% from 15% to 20% of our households by 2030.



from
Southern
Water 

The Southern Water logo graphic consists of three stylized, white, wavy lines that resemble water or a breeze, positioned to the right of the word 'Water'.