General observations

Chloe works in the Complex Crew Specialist team

Take all of the work away from them - we manage it for them

Sometimes paper invoices are missed/don't come through

Statement of account on portal rather than waiting 5 days from SSE after requesting

Validating invoices: uses a CRM, check the meter readings follow on, contract rates and VAT.

Speaks to the supplier on behalf of schools

1000+ meters 12% of the portfolio

get frequent debt reports - every 2 weeks

portal - downloading invoices

Quarterly billing - not a date that they're all produced on - spread out

New portal - LOA needs to be added problems adding, notifications not received, not getting invoices on time

clients often ask for a re-bill

clients pay direct to SSE

to be able to download a copy of statement of account - would be useful (currently 3 working days to receive it via email)

if we could bulk upload meter readings that would be good

Trusts can be under the same account but have different sites

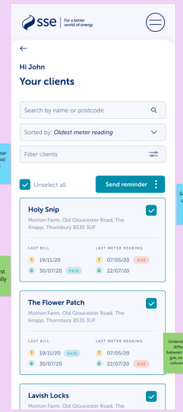
Schools email meter readings to them, added to spreadsheet, email this to SSE

Recommend customers to send meter reads at end of each month

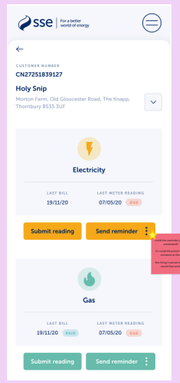
Roughly 1000 meter reads per month sent to SSE

sometimes (not goes billed) depends on individual school goes billed, it depends on how they've set that up

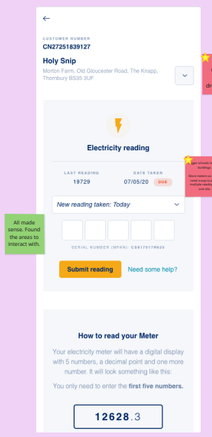
TPI-Meter-readings-active



TPI-customer-info



TPI-add-a-reading-electricity



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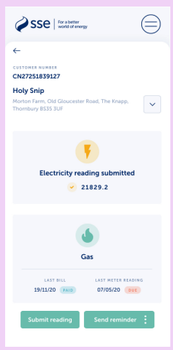
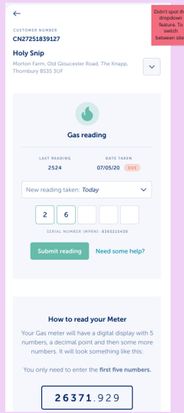


TPI-add-a-reading-gas



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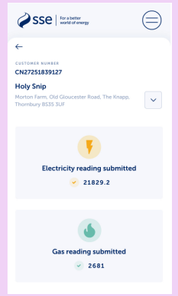
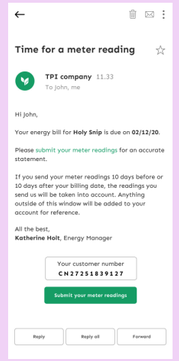


Email to TPI client



Didn't spot this dropdown feature. To switch between sites.

If they were on the same account number they would need to change account number

I guess that would be the dropdown arrow would be different sites

This type of feature could be a selling point for clients at the contract phase - being billed accurately is a big win for some

Bill validation team download invoices, it would be helpful for them to be able to see if a meter read was due when they log into the system

The majority do the readings at the same time

If trusts have eg 3 schools under 1 trust, they might send readings on different days

Trusts - Zen emails trust, trust forwards email to schools

Zen send reminder to trust + trust reminds multiple schools - but not all readings reading

Would we list out five fields with 5 serial numbers?

All made sense. Found the areas to interact with.

Missing: multiple sites dropdown

Got it eventually

Would be really helpful as it's difficult for the school to get the readings across

automated reminders might work well for them

Time for a meter reading

TPI company 11.33
To John, me

Hi John,

Your energy bill for **Holy Snip**, **Morton Farm** is due on **02/12/20.**

Please submit your gas and electricity meter readings for an accurate statement.

If you send your meter readings 10 days before or 10 days after your billing date, the readings you send us will be taken into account. Anything outside of this window will be added to your account for reference.

All the best,
Katherine Holt, Energy Manager

Your customer number
CN27251839127

Submit your meter readings

Reply | Reply all | Forward

The level of service matters to our customers - we can class this as a selling point - customers get frustrated that meter readings aren't used

Bigger schools can have more than one meter - send a table of meter readings to fill out

It would be really helpful as it's difficult for the school to get the readings across

Would that direct them straight to the portal

Sometimes clients send meter readings without the serial number so it can be hard to know what meter reading relates to

Work on behalf of school. Issues with invoices validations, contract rates, meter removal. Zenergy

Invoices go to energy hub, they validate and then send them over.

They check meter readings, VAT, check contract rate.

Mainly education sector. Have started to fix bills out.

Makers with 150 - 1000 - 10k of portfolio

Normally quarterly & in sync already in the portal

Sometimes - I haven't received the bill from the school - I'm chasing

Would be good to have a reminder for statements.

Would be good to have a reminder for statements.

Thanks! Currently in the portal, but I'd much more at point in time

People pay direct for SSE. Some on DD.

Some can't be on DD because it's paid by council.

Currently send Meter Readings in bulk to SSE via email.

Schools will email meter readings to Zenergy.

They then pass that on.

They ask the clients to send the readings as the invoices don't match. Ready for the next bill.

Some clients send meter readings (some don't. So they aren't submitting at) 1007 all the time.

General observations

General observations

Positives

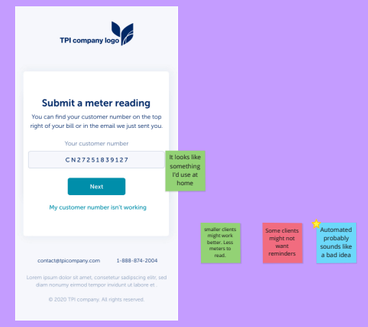
Negatives

In the SSE portal every day

Thinking of creating their own app to collect data, this could do it for them

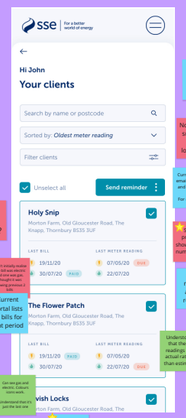
Don't proactively chase people for meter readings. Reactive responses

Easy for customers to complete the reading submissions but I think it's easier for brokers to email big Excel sheet - big education piece needed by SSE on benefits of new approach

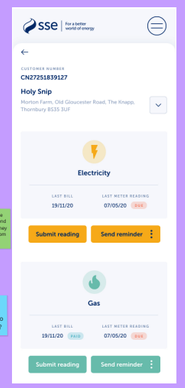


Didn't get this far

TPI-Meter-readings-active



TPI-customer-info



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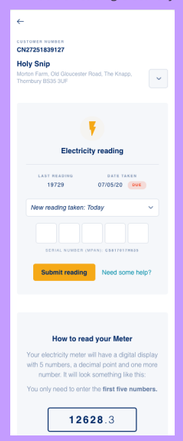
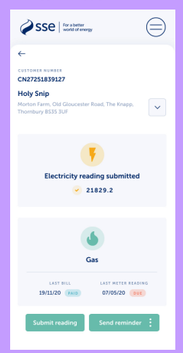
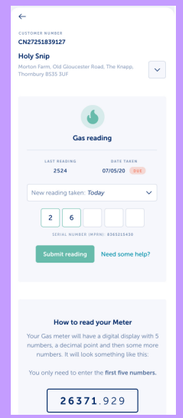


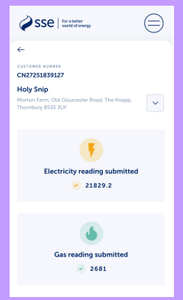
TPI-confirmation-1



TPI-add-a-reading-gas



TPI-confirmation-2



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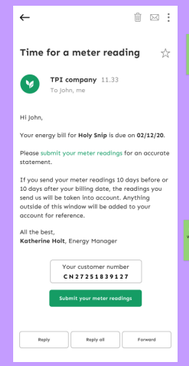


General observations

TPI-email

Happy to click on here

customer-log-in

Noticed customer number pre-filled

The option to forward this on to a tenant to submit meter reading is great. No need to login.

customer-info

Everyone skips this - should we improve the visibility of this

Noticed both gas and electricity options

customer-add-a-reading

Used the back arrow

Noticed the Due label

I wondered what the due button did..

Is this an actual or an estimate?

Sometimes sends meter reads from a few days ago

Easy to use

MPAN - is fixed! Serial number can change!

Preference is app but functionality is poor - would like to have both. If login details saved then it becomes like an app

Worth having the option to upload a photo to increase confidence to customers?

If this information was on hand (by Accounts / App, Website) then we could make a meter reading and submit it

Sites set up with individual account numbers

Site reference number

Almost a surface for each landlord, property, meter - unless we also can handle numbers per address

I would still take a photo purely because I have had multiple meters on site

Multiple meters on site. Still might only be asking for one of those meters. Which one? Maybe all of them right so well get all of them.

Thinks an app would work better - would set up property managers

PMs can submit reads there and then

Open to human error - what are the checks that SSE have

Are there any flags to catch incorrect submissions

Haven't submitted a reading on the current SSE portal. Sends photos via email

customer-confirmation-1

customer-add-a-reading-gas

customer-confirmation-2

customer-confirmation-2b

General observations

Oxford City Council

Look after contracts/billing for all council properties

Roll-out of smart meters: 60% completed

80 hou centres, public loos, temporary accommodation, scheduled housing, cemeteries,

SSE contract covers small/medium sized properties

sometimes are readings don't make it into the system - no feedback if upload has worked

Midway through contract admin... so council is no longer responsible for

Receive EDI billing - specialist software validates, inputs to system

every 2 years contract renewal

Some council teams are good at taking meter readings - others not so much... need to arrange site visit

Normally get evidence - just in case there's a re-bill

Big drive to get smart meters

Photographic evidence is sometimes asked for

Complicated site: tower blocks where readings aren't done for a long time - big discrepancies

Different sites managed by different local teams

Council are named account holder in temporary accommodation to avoid changing contracts

portal for getting bills and smart meter upgrades - we can update our DB for corporate reporting

query management would be useful - flags where readings haven't been updated

Meter location could be a nice to have feature

Ability to upload proof of payment if there is an queries

Log change of occupiers - currently having to send a spreadsheet through in email. Don't know if it's received

We do a bulk BACS payment

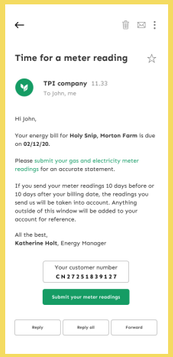
600 invoices can form a BACS payment...

Payments not always allocated properly

online forms getting away from Excel would be a lot easier - saves us having to cross-reference

autopopulate and streamline

TPI-email

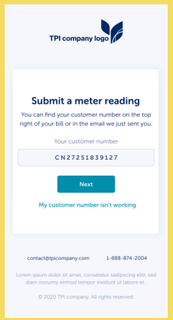


Doesn't tell you what site - although Holy nip is referenced! - Missed it

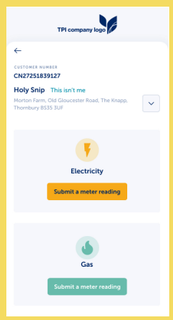
Do I log in?

We've got 9 group accounts with 600 sub-accounts

customer-log-in



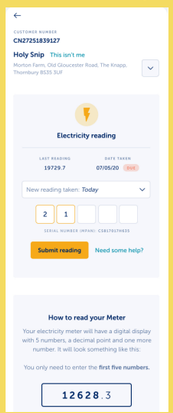
customer-info



What does the dropdown do?

Serial number very small - we know definitely it's the right no

customer-add-a-reading

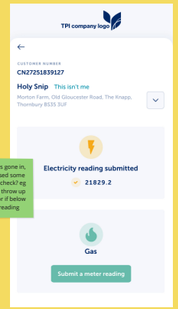


one address can cover 8 blocks = 8 meters

We do enter reading on a different date

Team takes a photo and sends it over

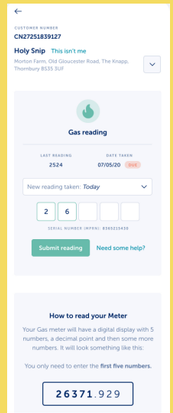
customer-confirmation-1



Has this gone in, or passed some sort of check? eg should throw up an error if below last reading

We use the customer number or the MPAN to identify a site

customer-add-a-reading-gas

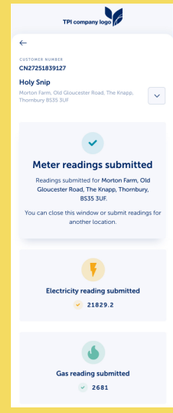
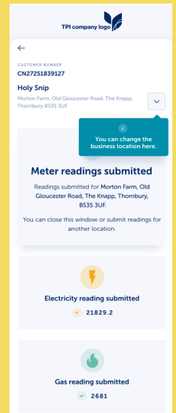


There are occasions where you are getting 5 different emails for 5 different sites

presumably this is due soon otherwise you'll end up with an estimate?

It would be good if the system would auto-populate all the information

customer-confirmation-2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