Wayl-ease: Discovery Phase

End of Phase Meeting

13/05/2024

Meeting Agenda

1. Welcome and Introductions

2. Project Overview

3. Overall Work Package Summary

4. Summary of Individual Work Packages

5. Overall Project Lessons Learnt

6. How Project Specific Conditions were met

7. Issues identified and overcame

8. Final update on the risk management and project plan

9. Comms and engagement plans going forward

10. Plans for Alpha Phase

11. AOB

1. Welcome and Introductions
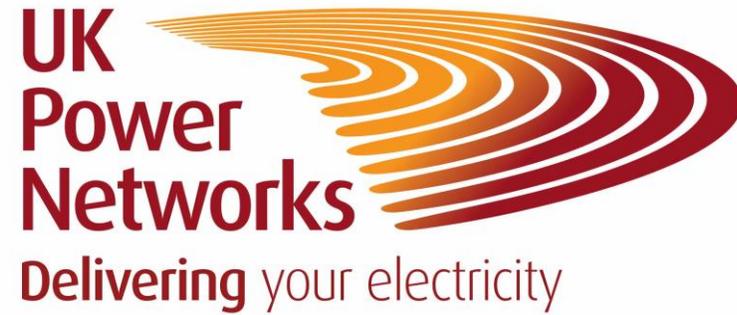
2. Project Overview

Problem → Approach → Aim

Problem

Gaining consent from public and private landowners to access their lands to install and manage electrical network equipment presents a challenge to electricity network operators.

Approach

Ensure the right payment for the right equipment under the right consent agreement at the correct rates to:

- Enhance customer satisfaction.
- Increase network security.
- Support achieving net-zero targets.

Aim

The Wayl-ease project aims to address this challenge by identifying innovative solutions to streamline consent management.

3. Overall Work Package Summary

WP1
Evaluation of current situation

- Identified the different aspects of the challenge to be addressed through stakeholder engagement.

- Mapped the existing wayleave processes, defined the improvements that Wayl-ease could provide.

- Prepared requirements and customer journeys for the proposed solutions.

WP2
Assessment of business value, organisational and technical analysis

- Identified potential technical and commercial solutions, assessed their ability to meet the user requirements identified in WP1.

- Developed a roadmap to identify the actions needed to implement such solutions.

- High-level business case analysis on identified solutions.

WP3
Recommendations and road mapping

- Consolidated and reviewed findings from WP2 assessment to identify roadblocks and potential solutions.

- Developed of a roadmap for future Wayl-ease development.

- Provided a final recommendation on which options to be selected and features to include.

WP4
Project governance and engagement

- Delivered the project objectives on time and to budget.

- Ensured the partners were aligned on the project challenges, risks, timeframes and success criteria.

*WP = Work Package

4. Work Package 1 - Overview

Research Undertaken

- Desktop research.

- Four one-to-one sessions with consents staff.

- Two "Problem and Process" deep dive group sessions.

- Weekly SME checkpoints.

- Customer interview.

Pain Points Identified

- Confirmation of proof of ownership.

- Lengthy email exchanges with customers.

- Confirmation of asset types and locations within land boundaries.

- Correct compensation assignment.

- Map drafting.

- Site visits by surveyors.

Key Learnings

The process is reactive and influenced by factors such as:

- Limited customer understanding.

- Manual processes to serve customer consent claims.

- Lack of full systems integration.

*SME = Subject Matter Expert

4. Work Package 1 - Consents process from workshop

Steps	Enquiry	Proof of Ownership	Equipments and agreement Verification	Receive Claim and Check	Rent assignment	Draft wayleave agreement	Customer signature	Payment received
Customer	Business Landowner (Farm)	Domestic Landowner	Solicitors	Claim Agents				
Front stage	Enquiry Team	Basic Webpage	Online Form	Email	Post Letters	Phone Calls	Surveyors	Customer Service Team	Cheques/ Post Office Returns

Backstage	Consents Processing	Connections Delivery	Network Operations Management	Legal Assurance	Customer Service Improvement	
Systems	NetMap (GIS Systems)	SAP Asset Register	SAP Finance	Wayleaves Payment System (WPS)	SAP WPS	AdobeSign Doc
Ideas Shared	Handle consents and customer interactions centrally		Internal staff training on wayleaves and consents		Easing customer understanding of wayleaves, pricing and process	An easier and more efficient process for generating wayleave agreements

Process pain areas for workshop participants   Highlighted by UK Power Networks Expert

*GIS = Geographic Information System

4. Work Package 2 – Requirements from a solution

Stakeholders

- Reduce customer confusion.

- Reduce customer disputes.

- Less time-consuming consent entitlement review and consent agreement generation.

- Accurate network records.

- Auto-generated wayleave plans that include land registry boundaries.

Business

- Ensure electricity supply continuity for existing customers and timely connections for new customers.

- Increase Broad Measure of Customer Satisfaction (BMoCs).

- Decreased termination risk and Increased Network Security.

- Reduced diversions and associated costs.

- Ensure data accuracy and consistency of data across systems.

- Automation of payments and processes.

- Reduce manual work.

Transition to BAU

- Change in consent management. Transition from reactive to proactive consent management.

- System integration: Integrating fragmented systems for streamlined operations and data flow.

- Enabling customer self-service.

Solution Functionality

- Transparency around consent types, rates, and payment terms.

- Ease in information access.

- Entitlement to the right consent type and right payment.

- Upfront customer data capture and consent document auto-generation.

- Adapt to and inform of customers land boundary changes.

4. Work Package 2 - Solution Options

Desired State: A customer's understanding of electrical network asset consent type, processes, rates, and valuations, will be facilitated by a friendly customer journey, interactive interface and automatic digital consent contracts with simple payments.

By automating and digitising the consent query and agreement process, operational inefficiencies will be eliminated, leading to quicker resolution times for enquiries, quicker consent agreements, quicker payments and increased network security.

Selected

Solution 1 - Consents hub with self-serve contracting

- Interactive and user-friendly interface serving customer information.

- Once assessed and user details confirmed pre-population of wayleave agreement.

- Payment automation
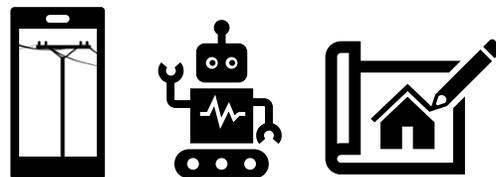
Solution 2 – Management Platform with AI asset photo recognition and automatic map generation

- Interactive and user-friendly interface serving customer information.

- Use of AI and geolocation of photo submitted of customer assets to draft a map which shows land boundary and assets under the agreement.

Solution 3 - Digital consent data environment

- A combination of features from both Solutions 1 and 2.

*AI = Artificial Intelligence

4. Work Package 3 - High level process flow
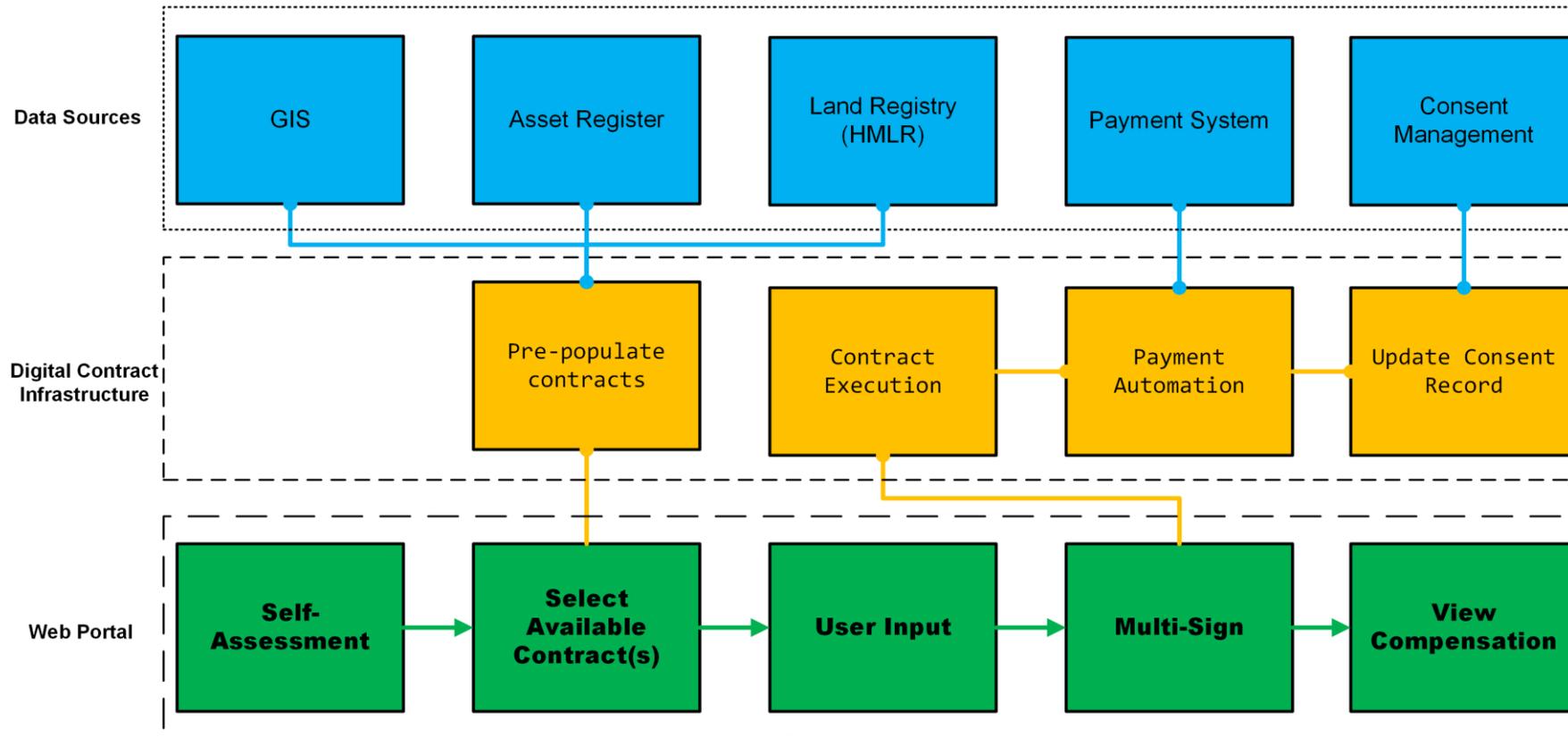
GIS (Geographic Information System): Spatial data management and analysis system

Asset Register (SAP): Database for recording asset details

Land Registry (HMLR): Data source containing land ownership records

Payment System (SAP): Module for financial transactions and payment processing

Consent Management: System for storing consent records

*HMLR = His Majesty's Land Registry

4. Work Package 3 - System Architecture

Customer Asset Photo

AI Asset recognition

Customer Web Portal

Landowner Onboarding and Contract Management Platform

Case Management:
- Proof of ownership
- Proof of entitlement

Geographic Information System

Asset Register

Consents Database

Payments System

UK Power Networks Data Warehouse

HM Land Registry

UK Power Networks' Data Lake
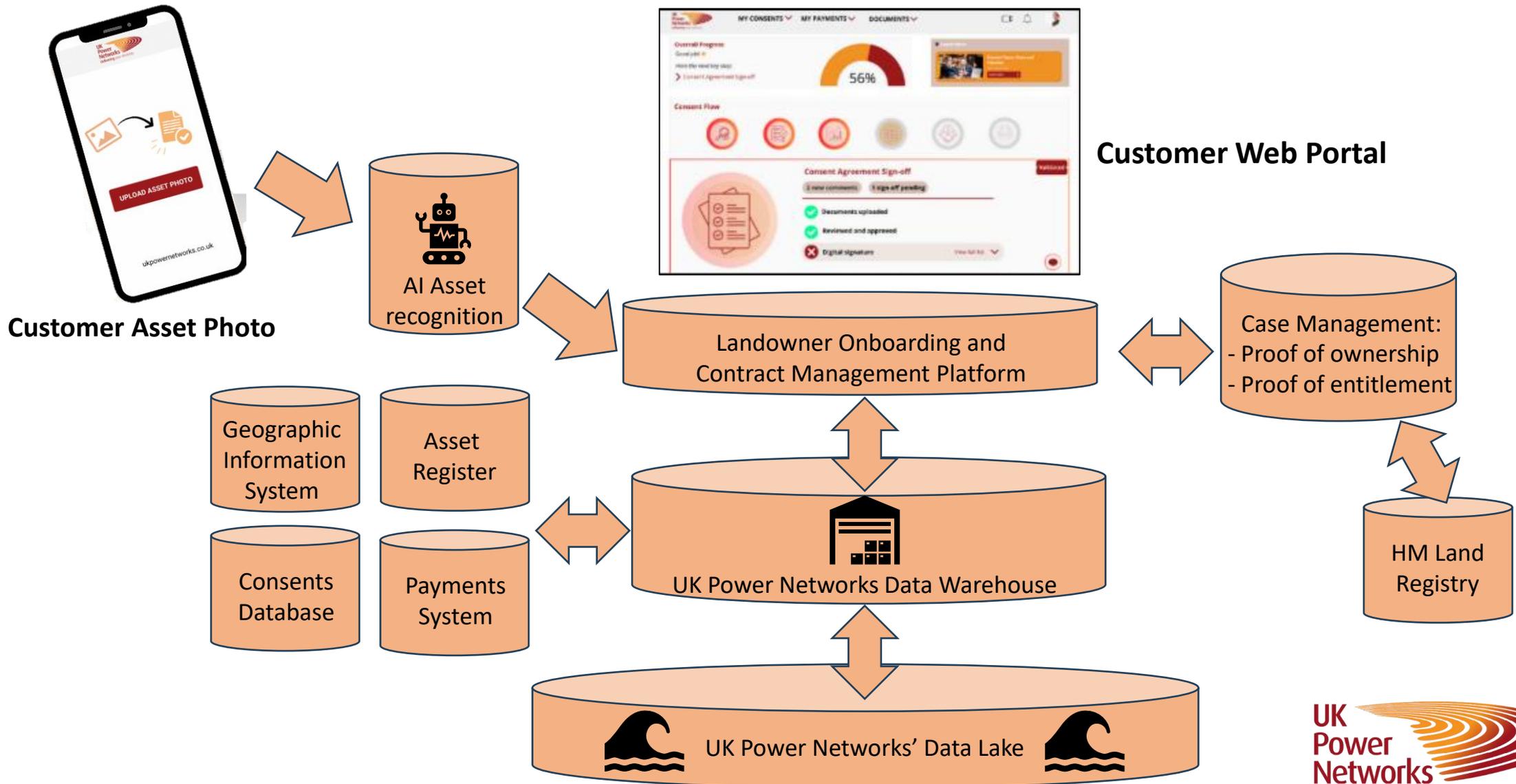
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4. Work Package 3 - Customer Journey

Persona: Landowner

	Aware	Customer Informed	Customer Confirmed	Complete Contract	Contract Payment	Data Generated
User actions	Customer made aware of issues, identify electricity assets in their property, receives payments, etc	Check Customer Region; Consent Process Information; Potential compensation rate is checked	**Image Capture** — Picture of Asset on the land is taken and uploaded; Upload Proof of Asset/Land; Customer is map based on asses and Land Registry ID; Upload Bank Details	**Customer with Discrepancy** — Case Management; **Confirmed Customer** — Enterprise Workflow Management tool; **Contract Workflow** — Select Applicable Contract; Fill out Required Fields; Digitally Sign	View Accrued Balance	Account Information; Land Information; Payment Information; Customer Information; Asset Information [e.g. Asset Condition]
Touchpoints		Web Portal	Web Portal; Phone App	Web Portal; Digital Contract; Enterprise workflow; Case management; CRM	Web Portal	Warehouse
Pain points	Understand if they are entitled to payment for an electrical asset on their property; Managing changes in ownership, assets or payment reference	Confusion around the process; Understanding the different consent types; Back and forth calls and emails; Understanding the different rates, payment terms, varied costs per asset and valuation	Create or Update ownership details; Proof of land ownership; Back and forth calls and emails; Get payment or manage payment issues	Case disputes around payment rate; Ownership changes; Follow-ups on Payment issues		Coordination for maintenance work if necessary; Safety inspections
Solutions		The Digital Consent Data Environment (DCDE)				Data Warehouse

*CRM = Customer Relationship Management

4. Work Package 3 - Solution Mock Up

5. Overall Project Learnings

Wayl-ease should aim to:

1. Facilitate consent understanding and fair compensation effortlessly for landowners so the consents team can increase the number of consent agreements, guarantee network security and improve customer satisfaction.

2. Improve consent process adaptability and capability to ensure the right payment for the right equipment under the right consent agreement at the correct consent rates while enhancing customer satisfaction, increasing network security and facilitating Net-Zero targets.
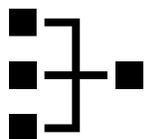
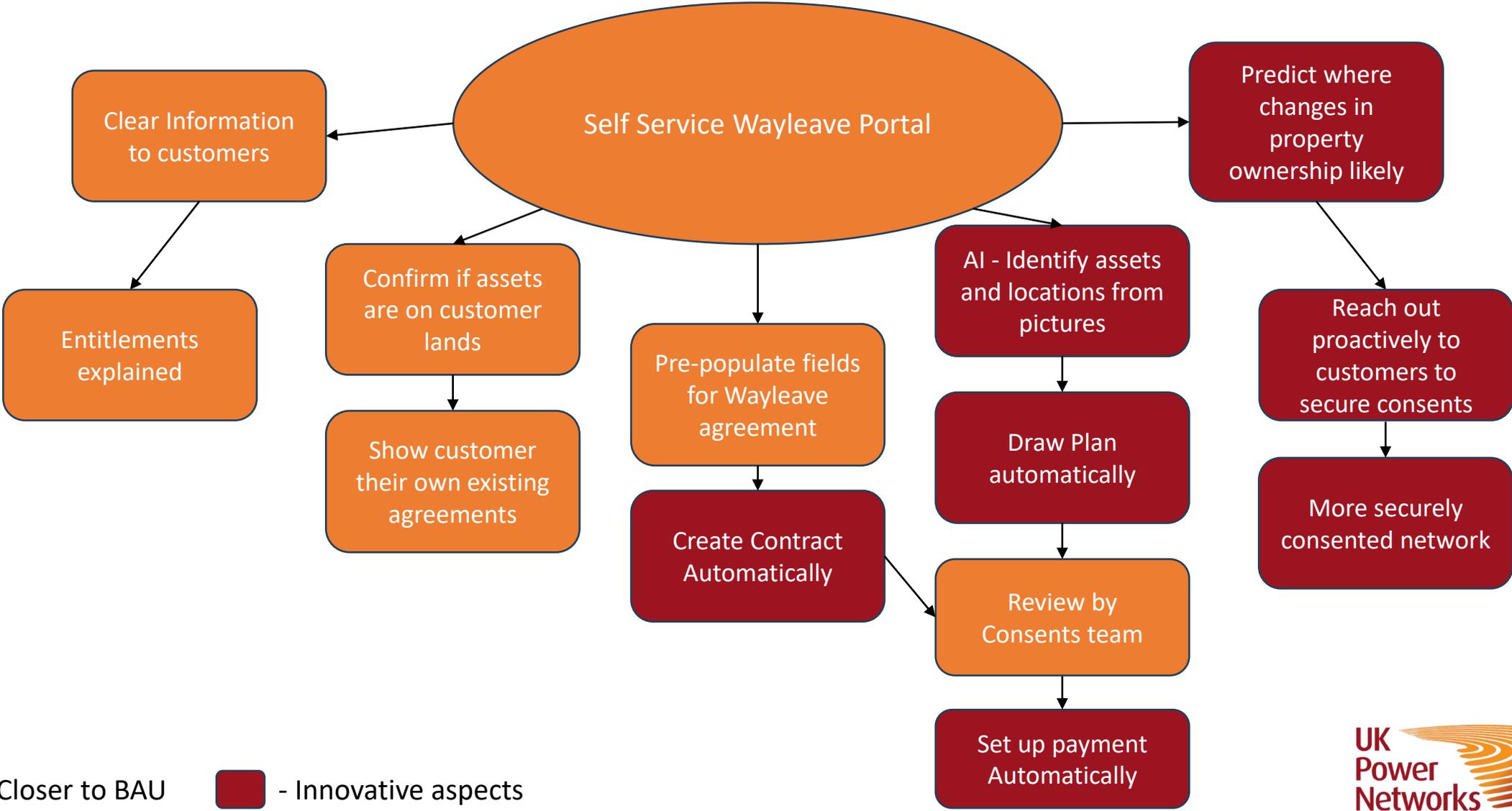3. Eliminate legacy activities, manual work, siloed data, and fragmented systems.

4. Accelerate the scaling of a lean consents process and harness the power of advanced emerging technologies to accelerate the effective delivery of business and customer value from the consent management process.

6. Project Specific Conditions

Condition	Description	Comment
1	The Funding Party must not spend any SIF Funding until contracts are signed with the Project Partners.	Completed
2	The Funding Party must report on the financial contributions made to the Project as set out in its Application. Any financial contributions made over and above that stated in its Application should also be reported and included within the Project costs template.	On track – to provide following project closure
3	The Funding Party must make reasonable endeavors to participate in all meetings related to the Project that they are invited to by Ofgem, UKRI and DESNZ during the Alpha Phase.	Completed
4	Prior to completion of the Discovery Phase the Funding Party must clearly define and present, to the Monitoring Officer, the aspects of Wayleave Management that are innovative compared to existing practices and the aspects that can be dealt with under business-as-usual activities to demonstrate the additional benefits that are valued by customers and landowners.	Completed (see next 2 slides)

6. Project Specific Condition 4 – Innovative aspects of solution

Self Service Wayleave Portal

- Clear Information to customers
  - Entitlements explained
- Confirm if assets are on customer lands
  - Show customer their own existing agreements
- Pre-populate fields for Wayleave agreement
  - Create Contract Automatically
- AI - Identify assets and locations from pictures
  - Draw Plan automatically
  - Review by Consents team
  - Set up payment Automatically
- Predict where changes in property ownership likely
  - Reach out proactively to customers to secure consents
  - More securely consented network

- Closer to BAU
- Innovative aspects

*AI = Artificial Intelligence

6. Project Specific Condition 4 – Expected Benefits

For the prioritisation of the solutions, the project team considered the expected benefits, strategic fit given the agreed business requirements and the expected complexity of the implementation.
The benefits were estimated mainly as:

- **Operational efficiency savings** coming from the reduction of the annual staff cost associated with wayleave claims and general enquiries, third-party agent fees, own agent enquiry costs, surveyors' costs given the current process as is, and diversions budget costs.

- **Risk reductions** in disputes, compliance, consent terminations, and not meeting Net-Zero goals.

- **Improved data flow** for decision-making, asset consent network visibility, improved information accuracy and analysis.

- **Improved customer satisfaction** by reducing customer interruption, customer lost minutes and customer experience. Field staff being able to access electrical network assets as correct consents are in place.

- **Improved employee experience** and increased workflow capacity.

- **Scalable impact** to deliver benefits to other network operators.

7. Barriers and issues that we identified and overcame

Barriers

Short timelines for in depth verification and trial testing

Customer accessibility for continuous feedback and development

Upfront access to key project information from multiple stakeholders

Issues

Cross-organisational legal contracting and approval timings

8. Key Risks

Ref from Risk Register	Risk Description	Likelihood (before mitigation)	Impact (before mitigation)	Mitigation	Likelihood (after mitigation)	Impact (after mitigation)	Discovery Phase Status
R2	Lack of clarity on how solution defined in Discovery Phase will be realised in the Alpha Phase.	Medium	Medium	An agile approach was adopted that ensured that the insights gained from user and industry research was be validated with experts. The Insights were used to define user requirements that again were be validated with users for confirmation of understanding by project team. The solutions were assessed for usability, feasibility and viability and again a summary of the options with a clear recommendation was played back to experts for validation.	Low	Medium	Closed
R3	Lack of availability/capacity of UK Power Networks SMEs and further project stakeholders to support.	Medium	High	Ensured milestone dates and deadlines were clear to all parties at the start of the project, and that the value of the project to UK Power Networks was made clear to those SMEs to ensure buy-in. At a minimum weekly check-ins held with additional meetings set up as required and time set aside to review outputs.	Low	High	Closed
R4	Short time frame for project means any delays will result in potential loss of value.	High	Medium	The project was structured in an agile approach ensuring that value was realised in short increments of activity. Week sprints realised value early and progress to scope of the deliverables was constantly checked.	Low	Medium	Closed
R5	Partners are unable to deliver because of resource constraints or a change in partner priorities.	High	High	The structure of the project team was formed in such a way that multiple people could provide cover for key roles. Digital Catapult had many resources available that could be swapped in case of emergency All documentation was kept up to date, decisions and assumptions were maintained, as well as risks and issues. Meetings were all recorded and filed to ensure quick ramp up for any replacement resources.	Medium	High	Closed

*SME = Subject Matter Expert

8. Updated Project Plan

Wayl-ease: Discovery Project - Gantt Chart				2024													
				March					April					May			
				w/c 4 Mar	w/c 11 Mar	w/c 18 Mar	w/c 25 Mar	w/c 1 Apr	w/c 8 Apr	w/c 15 Apr	w/c 22 Apr	w/c 29 Apr	w/c 6 May	w/c 13 May	w/c 20 May	w/c 27 May
	No	Deliverable	Lead													
WP1	D1.1	Identification of the different use cases (solutions)	Digital Catapult			◆ D1.1	◆ D1.1									
WP2	D2.1	Assessment -business value, organisational and technical analysis	Digital Catapult									◆ D2.1				
WP3	D3.1	Recommendations and road mapping	Digital Catapult									◆ D3.1	◆ D3.1			
WP4	D4.1	Project Governance and Engagement	UK Power Networks													◆ D4.1

Project Activities for remainder of May:

- Show and Tell presentation preparation.
- Alpha Phase bid preparation and scoping of roles for additional partners.
- Review process of materials produced.

9. Comms and Engagement Activities

Project Workshops and engagement
- Heavy focus on internal engagement and securing business support.
- Project interest from other networks gauged with potential partner identified for Alpha Phase.

Publications and Outputs:

- UK Power Networks released a press release to celebrate Discovery Phase Round 3 SIF projects.

Ongoing Engagement:
- Discovery Phase Show and Tell session 05/06/2024.
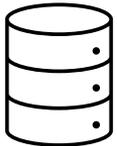- Engagement with new partners for Alpha Phase.

10. Alpha Phase Work Package Proposals

1. **Customer self-service:** The Web portal build (including the User Experience), education, and compensation lookup.

2. **Automatic and digital contracting:** The digital contract platform, building a PoC that confirms its functionality and efficiency.

3. **Data scoping and integration:** The data transfer, understanding the data within the context of the processing requirements and proving that the data can be sourced, collated, normalised, interpreted and served efficiently and constructively to and from the Web Portal, the Workflow Management and the Digital Consent Data Environment (DCDE).
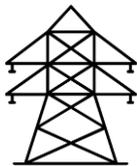
4. **Network scalability:** Engagement with other network operators to gather feedback, identify new features and explore scalability.

5. **Cost-Benefit Analysis:** In depth cost-benefit analysis and business model testing.

Potential additional partnerships for Alpha Phase

*PoC = Proof of Concept

10. Alpha Phase Work Package Proposals

	Timeframe	Timeframe	Timeframe	Timeframe
Date — The release timeframe	October 2024 - November 2024	November 2024 - January 2025	January 2025 – March 2025	March 2025 – April 2025

Release — The name of the release or working stream

	Goal	Goal	Goal	Goal
Goal — Expect benefits	• User experience optimised	• User feedback integrated and functionality achieved	• Scalability and revenue projections identified	• Compelling value proposition for the application

	Metrics	Metrics	Metrics	Metrics
Metrics — The metrics to determine if the goal has been meet	• Positive user feedback • Enquiries resolution time	• Enquiries resolution time • Third party agent fees • Own agent enquiry cost • Positive user feedback	• Estimated improvements in customer satisfaction score • Operational efficiency savings • New revenue estimates • New Wayleaves annual cost	• Application won

AOB

- Alpha Phase partnership requirements
- Show & Tell guidance
- AOB