

**YORKSHIRE WATER SERVICES LTD**

**PERIODIC REVIEW 2009**

**B6 – CUSTOMER SERVICE STRATEGY  
AND SERVICE ENHANCEMENTS**

**SECTION 1 – CUSTOMER SERVICE STRATEGY**

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## 1. INTRODUCTION


### 1.1. BACKGROUND

1. We are one of ten companies in England and Wales which provide water and waste water services to homes, businesses and other non-domestic properties.
2. We provide water and waste water services to almost five million people in the Yorkshire region. We serve more than 1.9 million households and around 140,000 business and other non-domestic properties.
3. We therefore serve around two million bill-paying customers and around five million resident consumers. We also serve those consumers who simply come to work in our region and those who visit, for example as tourists, and use our services.
4. We manage a water network incorporating some 250 water sources, 63 treatment works, 497 service reservoirs and 31,000 kilometres of water mains. In a typical day we produce around 1.3 billion litres of drinking water.
5. We manage a waste water network incorporating some 30,300 kilometres of sewers and over 600 treatment works. In a typical day we process around one billion litres of waste water.
6. The way that we manage our networks and operations has a direct impact upon our consumers - and additionally upon other people who travel through our region to reach other parts of the country.


### 1.2. OUR REPUTATION

7. We are now widely considered to be the leading service provider in the UK water industry. Our passion for service and our desire to deliver step-changes in service - not just for our consumers but for the water industry as a whole - is widely recognised by stakeholders both from within and from outside our industry.
8. We were awarded Utility Company of the Year for an unprecedented three consecutive years from 2004 to 2006.
 

Winner of Utility of the Year Award



2006 UTILITY INDUSTRY ACHIEVEMENT AWARDS
9. We have held the Government's prestigious Charter Mark for excellence in customer service for almost two decades, being commended for best practice on
 



CHARTER MARK

numerous occasions.

10. We know, however, that Government, water sector and industry accolades mean little if our consumers do not value the products and services that we provide.

### 1.3. *OUR APPROACH*

11. Consumers are right at the heart of our business, and we are committed to delivering an experience for them that is second to none. We understand that our consumers not only want high quality products and service but excellent value for money too. We also appreciate that consumer requirements and expectations evolve over time. This means that we need to keep improving our products and services but we also need to keep prices as low as possible.
12. To do this effectively, we need to understand our consumers' priorities, in particular where they would like us to improve our products and services.
13. We therefore place great importance on finding out what our consumers think of us, listening to their views and acting upon what they tell us. As such, we recognise the benefits of investing resources in conducting extensive research.
14. We take this same approach when developing our short term and longer term business plans. We carry out detailed research and consultation with our consumers, other representative organisations and key stakeholders, and we formulate our strategy and plans based upon their priorities and feedback.
15. In part A and elsewhere in part B and part C, we focus very specifically on how the views of our bill-paying customers – expressed through a comprehensive “Willingness To Pay” study – have shaped our investment plans for the next five-year period. We also demonstrate how this fits within the context of our twenty five year SDS (Strategic Direction Statement), which was again shaped by the views of our consumers.
16. In the following section, we lay out our consumer strategy. We outline the background to our strategy and how it forms part of our overall company strategy; we state the aspirations and objectives of our consumer strategy; we show how we are working to deliver them; and we explain how the strategy is manifested in both our twenty five year SDS and our FBP (Final Business Plan) for 2010-2015.

## 2. OUR STRATEGY

### 2.1. OUR VISION

17. Our Vision is “to be clearly the best water company in the UK”. In order to achieve this, our performance is focused upon six strategic themes: Service+, Compliance+, Value+, People+, Partners and Society (see figure 1).



Figure 1 - Our Vision wheel

18. We recognise that we need to strike the right balance across these themes, if we are to achieve our Vision. Effectively this means that we need to be successful in relation to each one of these themes.

19. We have therefore set aspirations, objectives, key performance indicators and targets for each one of our six strategic themes.

20. The strategic theme which focuses on the quality of the service that we provide for our consumers is, naturally, Service+. It would be wrong to assume, however, that this is the only theme which relates to our consumers. All six of the themes have a direct relevance for our consumers and therefore for our overall consumer strategy.

### 2.2. SERVICE+

21. We have identified six high-level objectives for our Service+ strategic theme (see figure 2).

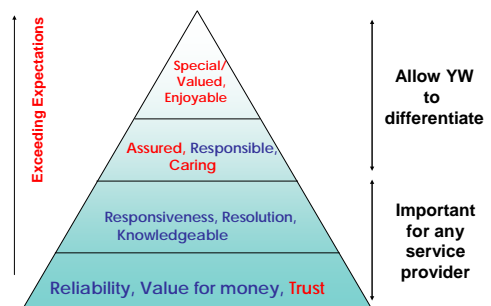


Figure 2 - Service+ strategic themes

- 22. These objectives are founded upon our consumers' current and foreseen priorities and upon what they believe a leading service company should aspire to deliver for its consumers. We believe that they are aspirational yet realistic.
- 23. Our CESG (Customer Experience Strategy Group) works to ensure consistency of approach and message across the whole business. This cross-business team is chaired by our Director of Water and comprises senior managers representing water, waste water, billing and contact centre, external communications, IT and regulation.
- 24. Underpinning Service+ is our 'consumer experience' definition.

**2.3. CONSUMER EXPERIENCE**

- 25. Our 'consumer experience' definition is depicted in the form of a pyramid (see figure 3) and derived directly from consumer research.
- 26. The bottom two tiers of the pyramid represent consumer expectations and the fundamental requirements for any service provider.



**Figure 3 - The Yorkshire Water consumer experience pyramid**

- 27. The top two tiers represent consumer aspirations for a leading service provider.
- 28. Our intention is to deliver a level of service on a day-to-day basis which consistently meets the expectations of consumers at the lowest two tiers of the pyramid. We recognise that providing products and services which are reliable, offer value for money and can be trusted are the fundamental expectations of our consumers.
- 29. Our aspiration is to provide an experience for consumers within the top two tiers of the pyramid. We recognise, however, that in striving to achieve this, we must also ensure that we continue to meet those fundamental consumer expectations and provide reliable, value for money and trustworthy products and services.
- 30. In order to achieve our intentions and our aspirations and to ensure that our consumers value the products and services that we provide, we believe that in the future we must deliver invisible operations accompanied by visible service for our consumers.

#### 2.4. *“INVISIBLE OPERATIONS, VISIBLE SERVICE”*

31. “Invisible operations, visible service” is the principle that underpins the way in which we are now looking to manage our networks and operations for the benefit of our consumers.
32. We know that we must eliminate the asset-driven service failures which cause disruption and inconvenience to our consumers and at the same time we must improve the experience that we give our consumers.
33. We understand that this will take time and resources, innovative thinking and techniques, and continuous consultation with our consumers to ensure that we are getting it right.
34. To help us to keep focused on improving the things that matter most to our consumers, we ask consumers what they think about our products and customer service, listen to what they tell us and act upon it. As such, we recognise the benefits of investing both time and resources in conducting extensive consumer research.

#### 2.5. *CONSUMER RESEARCH*

35. Our ongoing consumer research programme, carried out by independent, accredited market research agencies, helps us understand levels of consumer satisfaction, perceptions and expectations.
36. Within the programme we conduct three forms of consumer research, namely our ‘domestic tracker’ telephone survey, our postal ‘event-based’ surveys and our ‘DG9 replica’ telephone survey. We ask consumers what they think of the quality of our service and our products, and we seek their views on our day-to-day activities and our communications.
37. In a typical year we obtain views from more than 20,000 consumers through the programme. We analyse the feedback that we receive and use the data both to measure and improve our performance.
38. More than nine out of ten consumers chosen at random to participate in our ‘domestic tracker’ telephone survey indicate that they are satisfied with our products and customer service. Most of these respondents have not had any ‘direct’ contact with us in the previous six months or so.
39. In our ‘event-based’ surveys, where we have had a ‘direct’ contact or interaction with the consumer concerned, we score a little lower, averaging around 85% across the twelve activities which we measure.

40. Consumer satisfaction is just one of a number of key performance indicators which we derive directly from consumer research data. The findings are reported right across our business - from Board level downwards. For more details on our ongoing consumer research programme and for key performance results, please refer to part C1. We also publish this information on a quarterly basis on our website.
41. As well as our ongoing consumer research programme, we also engage the services of market researchers to carry out ad hoc consumer research projects. These tend to focus on a particular aspect of our service or activities, and usually combine quantitative and qualitative research techniques. They can cover a wide range of topics, for example water conservation; our leaflets, bills, letters and website; our automated telephone services; our publicity campaigns; and our recreational sites.
42. We track the results of our consumer research over time to help us understand whether we are keeping up with changing consumer expectations and requirements, and we listen to what our consumers are telling us in order to focus our efforts on improving those aspects of our products and services which matter the most to them.
43. Consumer research has therefore provided the intelligence which we have used to shape and measure the success of our strategic service initiatives.

## 2.6. *STRATEGIC SERVICE INITIATIVES*

44. Having built a solid platform from which to improve, we have been working hard in recent years to deliver a more consistent service offering, plus a more positive experience for our consumers.
45. We are focused upon delivering “invisible operations, visible service” for our consumers in the future.
46. We are therefore targeting asset-driven service failures, working to eliminate those things which cause most inconvenience to consumers, for example interruptions to their water supply, sewer flooding to their homes and the disruption caused by our road works. We are also working hard to improve other key aspects of our service offering – contact handling, communications and bill design to name just three.
47. Additionally, we are working to improve the softer, more emotive elements of our service, as these are essential for delivering the best consumer experience.
48. To help us to achieve this, we have implemented four initiatives, in effect change programmes. We track the success of these initiatives using a

combination of consumer and performance measures, and our CESG works to ensure consistency of approach and message across the projects. The four initiatives are called Clearwater, 2020, Focal+ and Logo+.

### 2.6.1. *Project Clearwater*



Figure 4 – Project clearwater logo

49. In our Water Business Unit the Clearwater project (figure 4) has been driving change, combining innovation and new ways of working to deliver improved and more efficient services for consumers.
50. The key area of focus has been to reduce the number of supply interruptions affecting our consumers. We know from our market research that simply delivering reduced shut-off times during supply interruptions is no longer acceptable, and therefore we have been working to find new techniques and ways of working to eliminate interruptions to consumers' supplies.
51. In the case of planned mains work we have adopted a variety of techniques including working on 'live' mains and using by-pass and overland supplies to prevent interruptions to consumer supplies. We have also introduced new techniques for installing meters, repairing valves and carrying out other routine maintenance work, all of which has reduced the need to interrupt consumers' supplies during the works.
52. We have been working hard to improve our understanding of the water network, making better use of telemetry, so that we know as early as possible when something, for example a burst, has occurred on the network. This then allows us to identify and locate the problem, and then tackle it where possible before it begins to impact on consumers.
53. To date this focus has contributed significantly to a substantial reduction in the number of supply interruptions per year. In 1999/00 we reported in our June Return submission to Ofwat that 9,720 properties had been affected by interruptions of greater than six hours. In 2007/08 we reported that just 2,388 properties had been affected by interruptions of greater than six hours.
54. Clearwater has also focused on reducing repeat consumer contacts and repeat jobs; improving existing processes which impact upon consumers; delivering training to our front-line people on how to create the best experience for our consumers; and introducing 'no-dig' techniques to help minimise the inconvenience to consumers caused by our activities.

55. To complement this initiative, our Water Business Unit has recently brought its contracted service partners on to our IT platform and has created a new customer experience department covering all consumer-related work, in order to ensure a more 'joined-up' approach and delivery.

#### 2.6.2. *Project 2020*

56. In our Environmental Business Unit the 2020 project (figure 5) has been driving change, again combining innovation and new ways of working to deliver improved and more efficient services for consumers and more efficient asset operation.



Figure 5 - Project 2020 logo

57. The 2020 project is working to eliminate sewer flooding to consumers' homes. More rigorous investigations, more effective maintenance regimes and more detailed analysis of the causes of sewer flooding incidents are helping not only to identify potential 'hotspots' but also to reduce the risk of repeat incidents affecting consumers.
58. Additionally, the focus has been on 'right first time' service, reducing repeat consumer contacts and repeat jobs, improving existing processes which impact upon consumers and delivering training to our front-line people on how to create the best experience for our consumers.
59. Consumers have benefited from specific projects to improve the knowledge and skill levels of our contact centre agents in relation to waste water matters; to fast-track jobs straight to our contracted service partners in order to deliver quicker resolution to problems; and to equip these service partners better so that they can carry out not just remedial work but more detailed cause and analysis work as well.
60. A new customer service department has been created, in order to deliver a more 'joined up' service and improve the experience for our consumers. Additionally, our Environmental Business Unit has recently brought its contracted service partners on to our IT platform, allowing full visibility of consumers' cases and management of our response to an even higher standard.
61. To continue our drive for enhanced value for money services for our consumers, we are also investing in new technology at our 25 largest waste water treatment works. This will allow us to monitor, maintain and operate these sites proactively, in some cases by remote control. The new technology and ways of working will cover 80% of our consumers' waste water, as we clean and return it safely back to the environment.

### 2.6.3. *Project Focal+*

62. Our billing, collection and contact centre services are carried out by Loop. Our Focal+ project there – focus on customers at Loop - has been working to deliver improved and more efficient services for consumers.
63. Again, the focus has been on ‘right first time’ service, reducing repeat consumer contacts, improving existing processes which impact upon consumers and delivering training to our front-line people on how to create the best experience for our consumers.
64. This initiative has resulted in significant improvements in a number of key areas, for example our automated telephone service; the annual statements that we send to meter customers who pay by monthly payment plans; communicating proactively with customers experiencing higher than usual metered usage; handling customer queries about metered consumption; and receiving debit card payments direct from customers
65. We have also implemented a number of collection and debt recovery initiatives, including improved liaison with Citizens Advice and other such advice agencies.
66. Additionally, we have a new ‘customer care’ team in Loop, which not only handles written consumer complaints but also works proactively to resolve potential complaints before they escalate.

### 2.6.4. *Project Logo+*

67. In our external communications team the Logo+ project (figure 6) has been driving change. Logo+ is a framework for developing new initiatives to enhance the look and feel of the consumer experience and improve the perception and visibility of our brand.



Figure 6 - Project Logo+ logo

68. This initiative has included the introduction of a single contact number for consumers to call us about billing, water and waste water matters; and a new style of branded clothing for our front-line customer service people.
69. Following consultation with consumers, we are making significant improvements not only to the look and functionality of our website, but also to the facilities at our recreational sites. This includes the creation of ‘supersites’ at two of our largest reservoirs, Swinsty and Langsett; this is also a key project in relation to the ‘Society’ objectives and aspirations within our company Vision.

### 2.6.5. *Research and development*

70. These four strategic service initiatives are forward-looking, with much of the focus now concentrated upon the next pricing period and beyond. To improve our products and customer service for consumers and keep prices as low as possible, we know that we have to find more innovative techniques and ways of working.
71. We understand that we need to manage our assets in a way that has minimal impact on our consumers in terms of disruption and inconvenience. We appreciate that we need to deliver invisible operations but maintain a visible service, not only if we want to satisfy our consumers' requirements and expectations but also if we want them to value what we do.
72. Project Clearwater has already invested a substantial amount of time and resources in research and development to help us manage our water assets better. Most recently it has been developing an innovative leakage repair technique using Platelet Technology®, which has now been used for the first time for live main repair.
73. We are planning to invest more time and resources in research and development, not just to identify new technologies and practices which will help us manage our assets better for consumers but also to help us understand how we can best enhance our consumer experience and keep our service visible.
74. The value and importance of research and development to help us achieve our 'invisible operations, visible service' aspirations for consumers is outlined in our twenty five year SDS.

### 2.7. *STRATEGIC DIRECTION STATEMENT*

75. Our company Vision, Service+ and 'invisible operations, visible service' provides the basis of the long-term strategy that we have set out for consumers in our twenty five year SDS.
76. Following extensive consumer research and stakeholder consultation, in late 2007 we published our long-term objectives, priorities and aspirations.
77. To help us to formulate our SDS, we conducted research with 1,000 domestic consumers and 350 small and medium sized businesses. We also consulted with our largest commercial consumers, our regulators and the Kelda Environment Advisory Panel. Additionally, we conducted research with local schoolchildren, our bill-paying customers of the future to hear what they thought their priorities would be in the future.

78. Details of the consumer research and stakeholder consultation are provided in part C1.
79. In our SDS, we set five strategic long-term objectives:
- A customer service experience second-to-none
  - A strong environmental focus
  - The lowest possible prices for customers
  - Attractive returns for investors
  - World class asset management and great people
80. We also identified ten equal long-term priorities:
- Ensuring there is never a need for water supply restrictions
  - Delivering the very best drinking water quality
  - Stopping our sewers flooding homes and businesses
  - Providing a customer experience second to none
  - Reducing leakage
  - Mitigating our carbon footprint and adapting to climate change
  - Going beyond environmental compliance
  - Providing tailored services for customers
  - Providing the lowest possible prices
  - Delivering attractive returns for investors and lenders over the long term
81. For each of these priorities, we set a clear aspiration:
- To have no water restrictions
  - To have zero drinking water quality failures
  - To have zero flooding of homes and businesses due to our assets failing
  - To have zero interruptions to supply
  - To halve existing levels of leakage
  - To meet greenhouse gas emission targets set by Government
  - To have zero pollution incidents resulting from our waste water assets
  - To provide tailored services and greater choice
  - To provide the lowest possible prices
  - To attract investors through our out-performance
82. In our SDS we also outlined “invisible operations, visible service” in relation to both our water and waste water services. We explained why research and development and sector-leading contract partnering will be vital, if we

are to eliminate asset-driven service failures and provide consumers with tailored services, greater choice and an experience which is second-to-none.

83. Our FBP for the AMP5, will make a significant contribution in helping us to meet our long-term objectives and priorities, and to achieve our long-term aspirations for consumers.

## 2.8. SERVICE ENHANCEMENTS

84. From 2010 onwards new customer measures will be implemented by Ofwat to capture customer views on the Company's handling of their contact, the level of satisfaction with the overall experience and reasons for dissatisfaction/satisfaction. Our objective to deliver a customer experience second-to-none will be reflected in these measures.

85. We already achieve a high standard of service on Ofwat's key customer service measures and will continue to improve our current performance as follows:

DG6:	We have consistently responded to 100% of our customer billing queries and will continue to do so.
DG7:	Ofwat's target is to respond to written complaints within 10 days. We commit to answering 99.90% within our own 7 day deadline and will compensate customers through our enhanced guaranteed standards scheme where we fail this target.
DG8:	As part of our AMP5 programme we are proposing a region-wide roll out of AMR (Automated Meter Reading) technology to all current and new meters. This programme will help us achieve a meter reading rate of 99.90% of customers receiving a bill based on an actual meter reading by 2014/15.
DG9:	At the beginning of the AMP4 period the DG9 measures related to the ease with which customers could make telephone contact with the company. This service measure has since been expanded to include a score based on the satisfaction with the way the company handles the call. We will improve our telephone call handling satisfaction to 4.70

86. Our telephone call handling strategy has developed through our Focal+ initiatives:

- 'It's Your Choice' – aiming to give customers the choice to contact us by the method they choose and deliver a consistently high standard of customer experience across all communication methods
  - 'More Than a Contact Centre' – training and developing our people to deliver excellent customer service. Up-skilling and multi-skilling our staff to improve first-time resolution of queries and problems
- 87. Our ongoing research demonstrates that some customers no longer find it acceptable to have their call answered by an automated message. We have responded to this feedback and now give customers more choice. We believe this is preferable to pushing them into using a transaction type which they have not chosen. This results in more calls than ever before being handled by a person, rather than a message or automated service.
- 88. Our customer satisfaction score has improved year on year, clearly showing that this is what customers want. Our quarter 4 score for 2008/09 of 4.77 is our best ever, giving us an overall score of 4.68 for the year.
- 89. Over the next five years we will reduce the level of abandoned calls to 5% and further improve the level of satisfaction score to 4.70.
- 90. The trend to opt for a meter as a basis of charge is expected to continue during the next five-year period. We are committed to providing an improved experience for our customers and will reduce the time it takes to install a meter.
- 91. By 2015 we will install 90% of our domestic meter options within 30 days and the remainder within 60 days. This exceeds our regulatory target of 90 days.

## 2.9. *BUSINESS PLAN 2010-2015*

- 92. Our FBP for AMP5 will make a significant contribution in helping us to achieve our Vision to be clearly the best water company in the UK; to meet our Service+ objectives; and to make clear and significant steps toward meeting our longer-term objectives, priorities and aspirations for our consumers.
- 93. Our investment plan has been drawn up with consumers firmly at its heart, using their priorities to help us determine where we should concentrate our efforts and resources during AMP5.
- 94. We carried out a robust "Willingness To Pay" study, to help us understand the priorities and views of our bill-paying customers, in relation to the levels of service that we need to deliver to meet our consumers' expectations and requirements for the next five-year period. This research – our largest

consumer research project in the last five years – was carried out by an accredited, independent market research agency and leading academics in the field. Throughout the study we took opinion from a separate academic panel of peer reviewers, to ensure that the study outcomes would be as robust as possible.

95. The findings of this "Willingness To Pay" study were a key component in the CBA (Cost Benefit Analysis) which has helped us to formulate our investment plans for AMP5.
96. To ensure that we had taken into account a wide range of views, we then carried out a detailed consultation exercise with some of our key stakeholders, including our largest commercial consumers, our regulators and the Kelda Environment Advisory Panel.
97. Details of this consumer research and stakeholder consultation are provided in part C1.
98. The following section highlights how our investment plan for 2010-2015, determined by the priorities of our bill-paying customers, also aligns with our overall consumer strategy.

### **3. OUR INVESTMENT PLANS**

#### **3.1. OVERVIEW**

99. Our investment plans for 2010-2015 have been shaped by our bill-paying customers' priorities and by the value that they have placed upon the various aspects of our service offering. As such, consumers are firmly at the heart of our business plan for the next five-year period.
100. Having carried out a robust "Willingness To Pay" study, followed by detailed CBA, we can demonstrate consumer support for expenditure on projects to improve or maintain current levels of service; and we can demonstrate that overall our investment programme for 2010-2015 is cost-beneficial. For details of our "Willingness To Pay" study and our CBA, please refer to parts C1 and C8, respectively.
101. Our bill-paying customers told us that they would like to see the levels of service for six aspects of our service offering go beyond current levels and that they would be willing to pay for these improvements. We have been able to demonstrate through our detailed cost-benefit analysis that the benefits from carrying out these improvements are greater than the costs of making them.

102. These aspects of service relate to drinking water quality (lead), drinking water supply (inadequate mains pressure), and waste water (bathing water quality, internal sewer flooding, sewage odour nuisance and pollution).
103. Our customers also supported investment to maintain the current level of service in relation to other aspects of water quality (biological and taste), water supply (security of supply, interruptions to supply, leakage and appearance), and waste water (sewage sludge recycling and river water quality), as well as renewable energy. Again, we have been able to demonstrate through our detailed cost-benefit analysis that the benefits gained from maintaining the current level of service for each of these aspects are greater than the costs of achieving it.
104. Only in the case of external sewer flooding – which affects land and gardens rather than buildings – did customers not value this aspect of our service offering sufficiently for us to demonstrate that the benefits of maintaining the current level of service were greater than the costs of achieving it.
105. In view of the outcomes of our "Willingness To Pay" study and our cost-benefit analysis, our investment programme for 2005-2010 includes work to deliver:
- The renewal or renovation of 714km of water mains
  - The renewal or renovation of 206km of sewers
  - A 34% reduction in internal sewer flooding from our assets and a 31 % reduction in the number of '1-in-10 year' and '2-in-10 year' properties on the internal sewer flooding 'at risk' registers
  - A 47% reduction in pollution incidents caused by our waste water assets
  - Improved bathing water quality at 17 bathing beaches
106. We have only proposed to address external sewage flooding issues where there is a positive net benefit, or where there are significant customer impacts. Where, however, properties are affected by internal sewer flooding for the first time during the period, we will also be able to seek out opportunities to deliver external flooding improvements at zero cost.
107. Additionally, the increased provision for research and development within our investment programme will help us to deliver improved products and services more efficiently, at lower costs, providing enhanced value-for-money for our consumers. It will also help us to develop our service offering and identify new ways to enhance the experience we provide for our consumers, in line with their expectations and requirements.

### 3.2. ALIGNMENT WITH CONSUMER STRATEGY

108. Our FBP sets out in detail the levels of service which our consumers will experience as a result of our investment programme for 2010-2015.
109. Through the outcomes of our "Willingness To Pay" study consumers are firmly at the heart of this plan.
110. An investment programme which targets sewer flooding to homes and businesses, pollution incidents affecting rivers and watercourses, and the quality of bathing waters at popular coastal resorts also clearly aligns with our consumers' long-term priorities, which are reflected in our twenty five year SDS.
111. An investment programme which targets asset-driven service failures will clearly help us as well to deliver 'invisible operations, visible service' for our consumers.
112. An investment programme which places great emphasis on innovation – on discovering and developing new technologies, new techniques and new ways of working – will additionally help us deliver the objectives, priorities and aspirations detailed in our twenty five year SDS, for example 'providing tailored services for customers' whilst 'providing the lowest possible prices'.
113. Our investment plan for 2010-2015 is therefore an essential part of our overall consumer strategy, delivering significant benefits for our consumers both in the short term and in the long term.