Ethernet IWG

March 2025

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Ethernet IWG Agenda

March 2025

Agenda item	Presenter	Time	Slot duration
Cablelink SORS	Andrew Butler	10:00	30
EAD 2.0	Mark Hitch	10:30	25
Project Swift	Ange Gray	10:55	30
OR reporting replacement	Hardev Sroa	11:25	10
Sales force	Abi Larkin	11:35	10
Go Direct	Abi Larkin	11:45	15
Open actions	Michelle Delaney	Available in slide deck	

SOR-7: Joint Site Cable Drop Visits

Andrew Butler

March 2025

SOR-7: Joint Site Cable Drops

What is the problem?

Today, we already perform Joint Site Cable Drop Visits during which (1) the CP extends the cable to the agreed handover AND (2) Openreach then pull the cable into the Exchange Cable Chamber, leaving it coiled and labelled.
A Joint Visit is needed where there is a H&S issue or access issue which prevent the CP from performing the Cable Drop without Openreach support.

This activity happens during the Cable Drop period of the order, which is typically capped at 90 working days.

However:
• There is no formal process to determine if a Joint Site Cable Drop visit is required
• The CP has to contact someone in the field teams, usually the surveyor or existing contact
• There is no ability for Openreach to monitor or manage when and how a CP obtains support
• No consistent notes capture when these cases occur.
This has created a situation where CPs have wildly different experiences across each patch and order.

While CPs have many other use cases for a Joint Site Cable Drop, Openreach has only committed to those where there are health and safety concerns or issues with handover box access.

SOR-7: Joint Site Cable Drops

High Level Solution

Aim: Update the existing adhoc process so that it has a consistent experience for all CPs, that can be carefully managed with both CPs and our engineers.
The new process should:
1) Allow Openreach to agree a Joint Site Cable Drop as early as possible in the order journey (during the Joint Site Survey)
2) Have a single way for CPs to engage Openreach to agree the time and date of the Joint Site visit.
3) Have no impact on the existing order journey

When should Joint Site Cable Drops be offered?
When there is a health & safety risk or when the location requires specialist access. No other reasons are in scope (for example, traffic management).

When would a Joint Site Cable Drop be known?
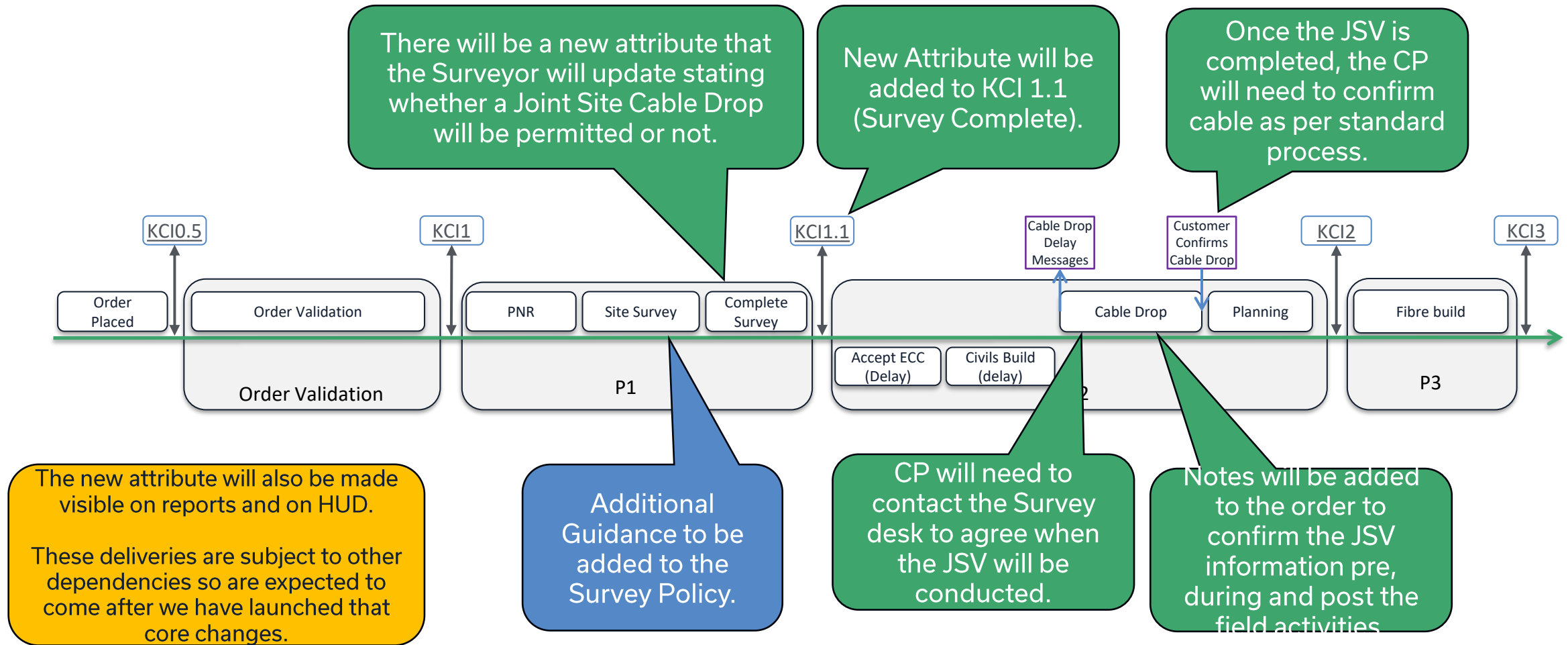During the Joint Site Survey, the Surveyor would determine if a Joint Site Cable Drop is required.

How will a CP know if a Joint Site Cable Drop is agreed?
Like with handover location information, the CP should be notified via KCIs (KCI1.1) and via View My Job (HUD).

How does a CP agree the date and time for the Joint visit?
The CP would contact the Service Desk, who would liaise with the relevant patch to agree a slot. This slot would be agreed during the Cable Drop delay... as it does today.

SOR-7: Joint Site Cable Drops

High Level process flow

There will be a new attribute that the Surveyor will update stating whether a Joint Site Cable Drop will be permitted or not.

New Attribute will be added to KCI 1.1 (Survey Complete).

Once the JSV is completed, the CP will need to confirm cable as per standard process.

KCI0.5   KCI1   KCI1.1   Cable Drop Delay Messages   Customer Confirms Cable Drop   KCI2   KCI3

Order Placed   Order Validation   PNR   Site Survey   Complete Survey   Cable Drop   Planning   Fibre build

Accept ECC (Delay)   Civils Build (delay)

Order Validation   P1   P3

The new attribute will also be made visible on reports and on HUD.

These deliveries are subject to other dependencies so are expected to come after we have launched that core changes.

Additional Guidance to be added to the Survey Policy.

CP will need to contact the Survey desk to agree when the JSV will be conducted.

Notes will be added to the order to confirm the JSV information pre, during and post the field activities

SOR-11: Ethernet Cablelink Resilience

Andrew Butler

March 2025

SOR-11: Resilience

What is the problem and what is the high-level solution?

While Ethernet Cablelink External Variant does support resilience the details and process are not clear to CPs and internal operational teams.

Industry ask is for the offering to be made clearer and the Survey & Delivery of resilient requirements to be enhanced.

The solution should:
1) Provide clarity to the what resilience offering is possible and how the ordering process works, including use cases
2) New "Structured Note" templated for CPs to use when requesting resilience
3) Enhancements to the Survey Policy to provide clarity to surveyors
4) Changes to the survey data to capture the key information so that this can be displayed to CPs.
5) Improvements to the internal Job Packs to make Resilience requirements clearer.

Note: the product offering is not changing. Openreach will continue to provide resilience on a reasonable endeavours basis because it is not possible to provide all types of resilience in all exchanges.

We are also discussing whether or not Resilience is right terminology or whether "Route Diversity" is clearer.

SOR-11: Resilience
High Level process flow

There will be significant changes to the Product description providing clear guidance to CPs.

During Manual Validation, Planning will validate the Structured Note, sending KCI 0.7 if incorrect

Surveyor to provide additional details for **type of resilience** agreed & the **associated Order reference,** when providing survey notes on NGWFMT

New Attribute will be added to KCI 1.1 (Survey Complete).

Job Pack will be enhanced to make sure the resilience requirements are clear

CP will use a "Structured Note" in the special arrangement notes,

The Information provided in the structured note will be passed to the surveyor verbatim

Additional Guidance to be added to the Survey Policy.

The new attribute will also be made visible on reports and on HUD.

These deliveries are subject to other dependencies so are expected to come after we have launched that core changes.

KCI0.5 | KCI1 | KCI1.1 | Cable Drop Delay Messages | Customer Confirms Cable Drop | KCI2 | KCI3

Order Placed | Order Validation | PNR | Site Survey | Complete Survey | Accept ECC (Delay) | Civils Build (delay) | Cable Drop | Planning | Fibre build

Order Validation | P1 | P2 | P3

EAD 2.0
Amendments & Modifications

Mark Hitch

March 25

EAD2.0 Order Amendments

Approach to manage order **Amendments**

Openreach will allow amendments to EAD2.0 orders - as it's acknowledged that requirements can change during order progression.

We've reviewed how we manage amendments today (in EAD) and are proposing an alternative approach for certain order attributes.

Location (same address) details		
Passive Demarcation Device (PDD) new option		KCI1.2
Housing (customer site end)		KCI1.2
Port		KCI1.2
Passive Demarcation Device (PDD) existing rack		KCI1.2
Rack		KCI1.2
Suite (a specific area within locate space)		KCI1.2
Room		KCI1.2
Floor		KCI1.2
Whereabouts (location in the room)		KCI1.2
Authorised ECC	:	KCI1.2

High network impact amends
(typically location end point)

- We will allow until KCI1.2 is issued only

However... At order placement CPs have the opportunity to give the End User Site contact authorisation to alter the end point termination location vs what is stated on the order (within the same room/floor)

✓ If the End User Site contact wants a location change and the Engineer can achieve it (within time/cost envelope) they will install and update the records on the order

✓ KCI3 will show CPs the actual location where installed.

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EAD2.0 order amendments – lower impacting amends to order

EAD2.0 Service features	
Bandwidth change (over 10Gb bearer only)	Install date minus 1 day
VLAN move (Same Headend cluster only)	Not amendable
Bearer Type* (1Gb or 10Gb)	KCI1.2

EAD2.0 Order details	
Contract term	KCI3
Site contact details (primary and secondary)	KCI3
CP helpdesk number	KCI3
Billing account details	KCI3
KCI level	KCI3

CRD	
CRD (Later Date)	As per EAD
CRD (Earlier Date)	As per EAD

- The tables are not exhaustive, a full list of amendable order attributes will be available in the EAD2.0 Orchestration Matrix

* Work ongoing to determine if Amend date can be moved more towards installation date.

Amend unhappy path scenario

What happens if **either** the engineer cannot complete install to alternative location **or** CP hasn't given consent on the order to site contact to change location?

We are working through options on how to manage this scenario and will return to the Industry with an update shortly

EAD 2.0 Modifications

Mark Hitch

March 2025

EAD2.0 - Modifications

What **modifications** can be made to EAD2.0 services once installed…

Modification of an EAD2.0 service. What can be changed after installation.

Remote Bandwidth Upgrade

Contract Commitment Length

VLAN Shift

PDD Internal Shift
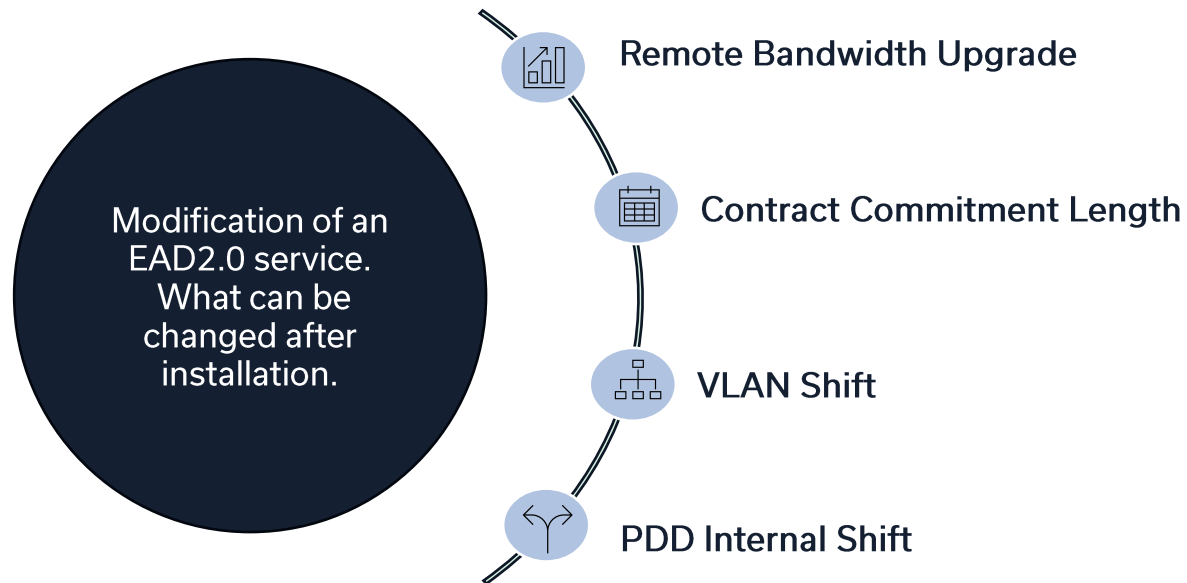
Bandwidth
- Remote upgrade from 1Gb to 2Gb to 3Gb & to 10Gb
- On the day
- Small one-off upgrade charge. Services moves to new prevailing rental (by bandwidth)

Contract length
- Change contract commitment
- Can move EAD2.0 service to longer a commitment period if required (from 12 month to 36 month)

VLAN move
- Ability to move EAD2.0 service from one CSC VLAN to another (Same Core Cable)
- Allows CPs to manage their own Traffic loading on CSC fibre pairs
- Nominal charge per VLAN shift
- Available on the day (or overnight)

PDD internal shift
- Ability to change physical location of PDD at customer premises (within building/floor)
- Charged via TRCs (the same as EAD)
- 30 working day Standard Lead Time

System development underway. We'll share designs/portal screens in due course

EAD 2.0 Cancellation & Cessation

Mark Hitch

March 25

Cancellation and Cessation

As you'd expect an ability to **cancel** orders and **cease*** services will be available

**Order Cancellation:
Provide, Modify, Cease**

Provide
- <u>Simple order journey </u>- Cancellation Charges apply from KCI2 (upon successful installation)

  If not successful KCI2 will not be issued until additional work/cost understood. \once known KCI2 and CCD will then be issued. i.e. the order will move to our complex order journey

- <u>Complex order journey </u>– Cancellation Charges apply from KCI2 + 5 working days

Modify
- Ability to cancel appointed Modify orders i.e. Internal shift of PDD only

Cease
- Cancellation of a cease order possible up to CRD - 1 day

**Service Cessation:
Provide**

- Ability to cease an EAD2.0 service

- Standard lead-time is 30 calendar days

Note – Early Termination Charges (ETCs) will apply if a service is ceased before its contract commitment period has elapsed

*Cease capability will be available shortly after March 2026   In Commercial Confidence

Project Swift

Ange Gray

March 2025

Ethernet | Continuous Improvements

Problem Statement

How do we deliver service to our Customers across all our Ethernet products to a consistent high quality, standard and in a timely manner?

What are our Customers telling us?

What are our Teams telling us?

What is working today?

What could we do different?

Mission Control

Outliers

ETHERNET PROGRAMME

Top 10 Cities

Discovery Sprint

SPRINT 2-4 WEEKS

Identification

RCA

Proposal

Post Implement

QUALITY

SERVICE

SPEED

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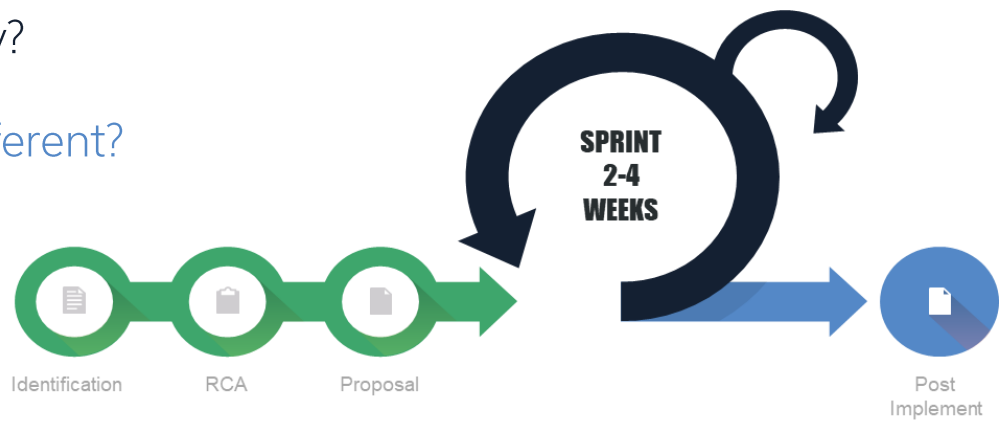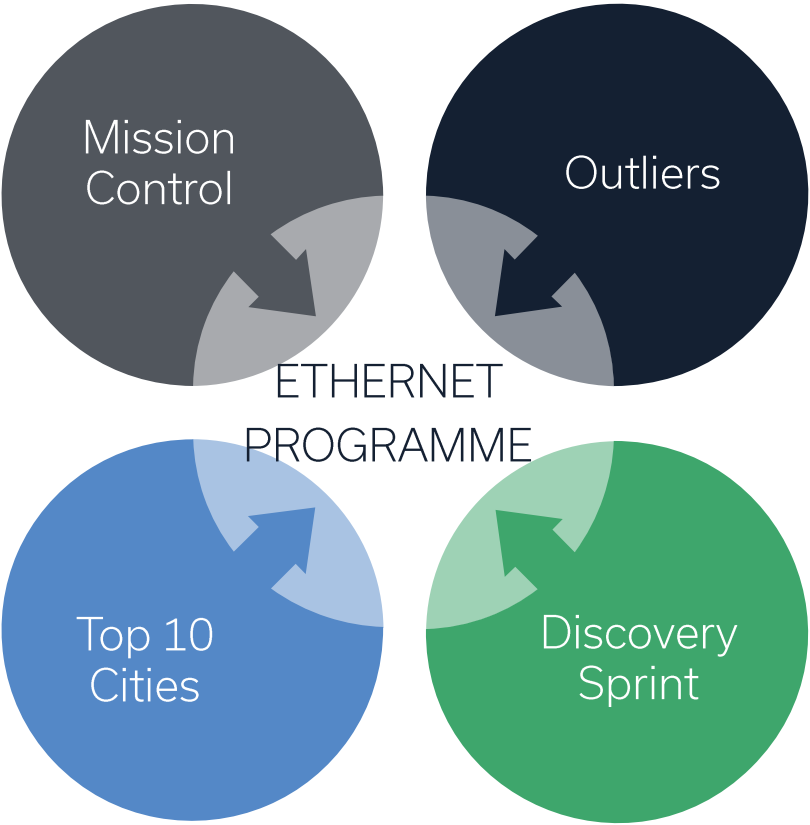
SWIFT | Delivery Approach

The SWIFT approach is about finding a way which will allow us to deliver quality service in a quick and agile way. To create a service differentiator we are aiming to provide delivery within our major Cities in the UK by the end of Day 5.

Specific Metropolitan Locations

Specific B End Exchanges Areas

EAD and DFA Circuits Only

Non RO2 Services Only

Non-Secure Sites
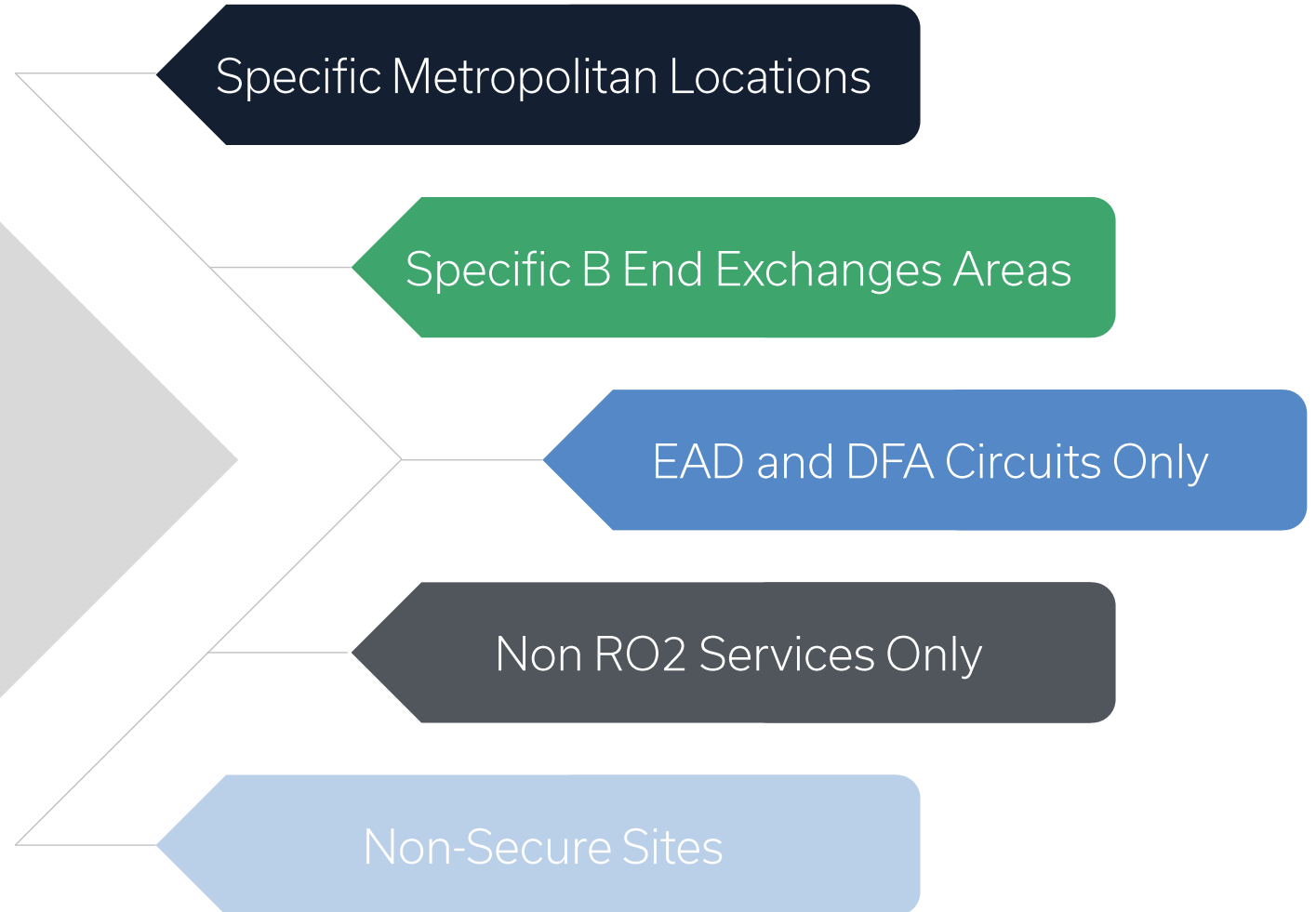
SWIFT | Process
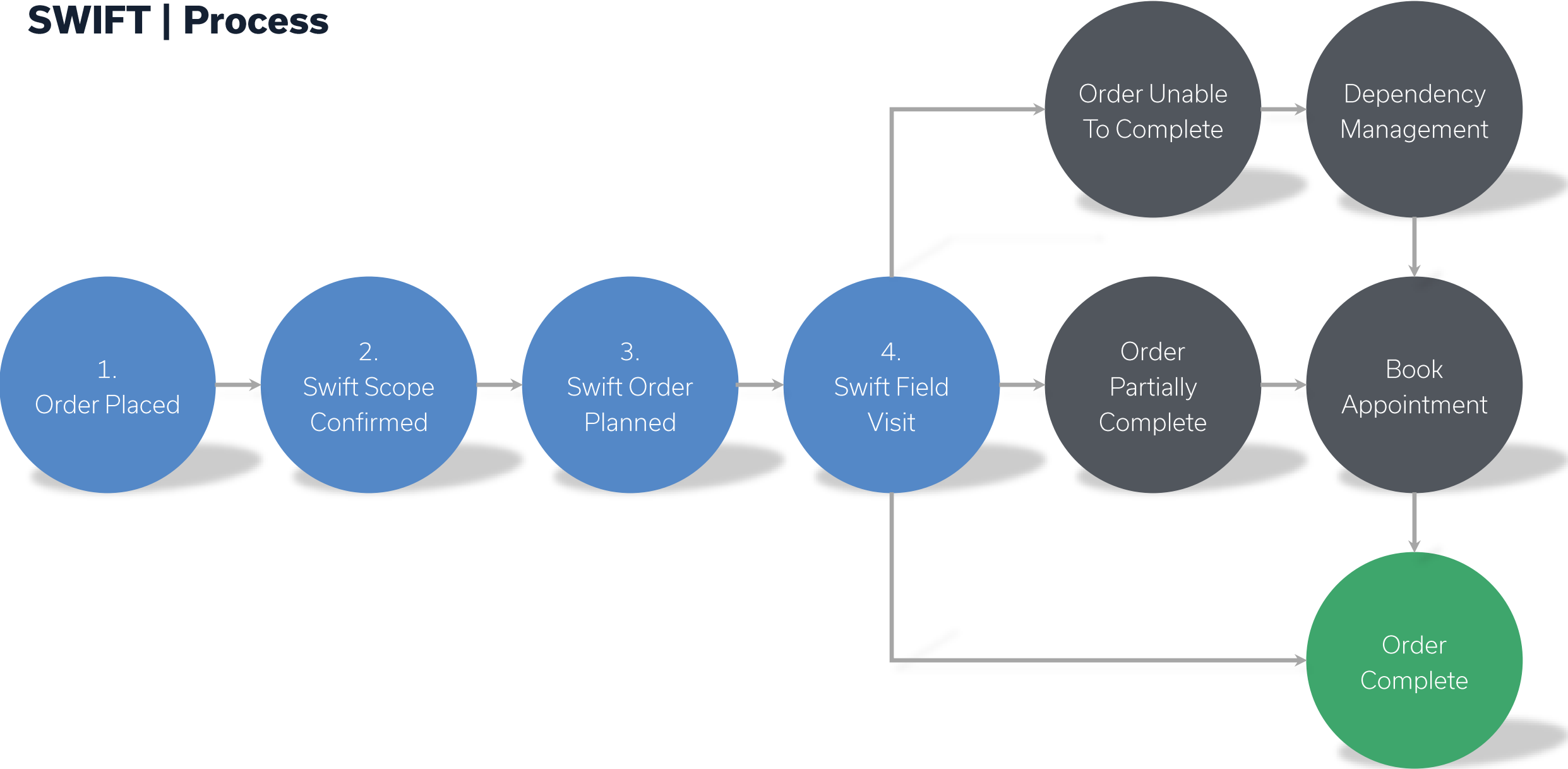
SWIFT | Findings and Benefits

| Order Fully Complete 36% | Order Partially Complete 31% | Mean Time to Provide 7 days |

Leveraging the Full Fibre network, to deliver service quicker

Planners use new advanced planning tool to produce lighter touch job pack

Engineering expertise earlier in the order journey

Engineers solution the order using the complex innovation tools available to them

Unable to complete, eyes on the ground means we know why, order back in planning within days

Enhanced Post Recording, improving network records over time

Quicker commencement of dependencies; blockages, traffic management and wayleaves

Considerable uptake in orders being accepted by CPs earlier than CRD

SWIFT | Customer Touch Points

Standard Delivery KCIs

Standard Delivery

Day 0	Day 6	Day x	Day 14		KCI	KCI	Day 30
KCI 1 Order Placed	KCI 1.1 Survey Completed	KCI 1.2 Planning Complete	KCI 2 Order Committed		Fibre Build Complete	Early Handover	KCI 3 Order Completed

Quick Win Delivery

Day 0	Day 6	Day x	Day x		KCI	KCI	Day 30
Order Placed	KCI 1.1 Survey Completed	KCI 1.2 Planning Complete	QW Success and KCI 2 Order Committed*		Fibre Build Complete	Early Handover	KCI 3 Order Completed

Day 6
KCI 360
QW Planning Checks

Day 17**
KCI 3 Order Completed

- *KCI 1.1, KCI 1.2, KCI 2 and Quick Win Success communication are issued at the same time
- ** National Average

SWIFT | Customer Touch Points

Standard Delivery KCIs compared to Swift Delivery KCIs

Quick Win Delivery

Day 0	Day 6	Day x	Day x		KCI	KCI	Day 30
Order Placed Placed	KCI 1.1 Survey Completed	KCI 1.2 Planning Complete	QW Success and KCI 2 Order Committed*		Fibre Build Complete	Early Handover	KCI 3 Order Completed

Day 6
KCI 360
QW Planning Checks

Day 17**
KCI 3 Order
Completed

- *KCI 1.1, KCI 1.2, KCI 2 and Quick Win Success communication are issued at the same time
- ** National Average

Swift Delivery

Day 0	Day x	Day 6	Day x	Day 14		KCI	KCI	Day 30
Order Placed Placed	QW Success and KCI 2 Order Committed*	KCI 1.1 Survey Completed	KCI 1.2 Planning Complete	KCI 2 Order Committed		Fibre Build Complete	Early Handover	KCI 3 Order Completed

Day 2
Ad hoc Notify & KCI 360
QW Planning Checks

Day 7**
KCI 3 Order
Completed

- *KCI 1.1, KCI 1.2, KCI 2 and Quick Win Success communication are issued on the at the same time
- ** Based on average through Proof of Concept

SWIFT | Order Example

ONEA911***** | Swift Complete

14 January	15 January	16 January	16 January	20 January	28 January
Order Validation Date	Swift order shared with the Field	Engineer visited Customer to deliver service	Email to CP advising service is ready	Adjusted CRD and CP Handover	Original CRD requested by CP

ONEA909***** | Swift Complete

7 January	9 January	10 January	13 January	14 January	18 February
Order Validation Date	Swift order shared with the Field	Engineer visited Customer to deliver service	Email to CP advising service is ready	Adjusted CRD and CP Handover	Original CRD requested by CP

SWIFT | Order Example

ONEA908***** | Swift Built

3 January	7 January	10 January	23 January	23 January	24 January	26 February
Order Validation Date	Swift order shared with the Field	Engineer visited external complete (no access)	Engineer visited, internal complete (appointed)	KCI to CP advising service is ready	Adjusted CRD and CP Handover	Original CRD requested by CP

ONEA902***** | Swift Complex

6 December	9 December	13 December	20 December	20 January	20 January	20 January	22 January
Order Validation Date	Swift order shared with the Field	Engineer visited blockage identified	Blockage cleared	Engineer visited, internal complete (appointed)	KCI to CP advising service is ready	Adjusted CR and CP Handover	Original CRD requested by CP

In commercial confidence

SWIFT | Next Steps

1 Continue to work through the feedback being raised

2 Technical and Operational Openreach changes

3 IWG to update on Swift enhancements to gain feedback

4 Standard ESF agenda for updates and feedback

5 Work through next steps for both Industry and Openreach

Back Up

Ethernet | Service

Retaining an unwavering focus on the improved service position. Whilst identifying further opportunities to deliver better service.

We continue to drive our live performance on Ethernet - on a YTD basis we are comfortably exceeding all five Quality of Service Standards.

Bringing together FND and Chief Engineer has led to greater access to innovations and new practices – leading to increased fluidity and a comfortable position on service – but we don't want to stop there.

The health of the live workstack is in good shape and remains a key focus as it drives QoS performance.

We are keeping a close eye on the progress to keep the momentum whilst also trialing specific sprints to improve even further.

Two separate sprints; Swift and Outliers. They aim to address the metropolitan customer's appetite for speed as well as Industry's need for us to better manage complex orders.

Workstack

22000
21000
20000
19000   18256
18000
17000
16000
15000

Feb-24 Mar-24 Apr-24 May-24 Jun-24 Jul-24 Aug-24 Sep-24 Oct-24 Nov-24 Dec-24 Jan-25

Age

38
37
36
35
34
33
32   32.58
31
30
29
28

Feb-24 Mar-24 Apr-24 May-24 Jun-24 Jul-24 Aug-24 Sep-24 Oct-24 Nov-24 Dec-24 Jan-25

—— Live MTTP

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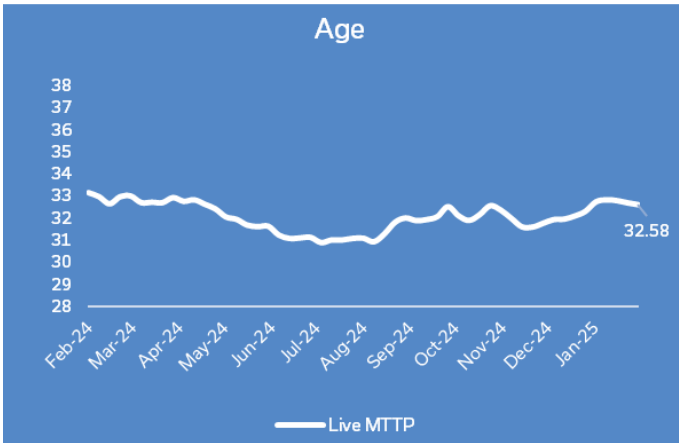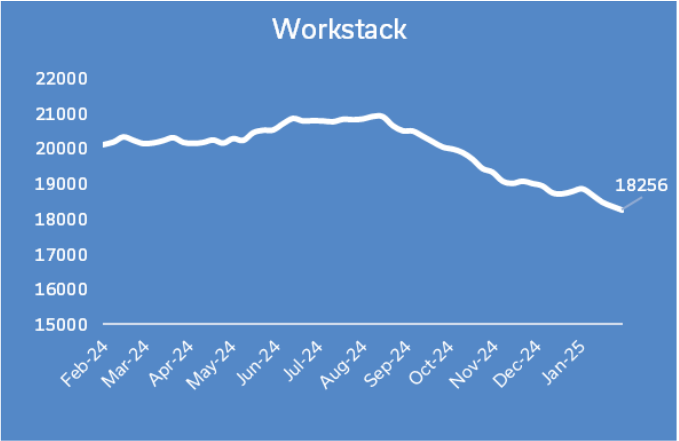
Ethernet | Outliers

Since July 2024 we've been looking at older failing orders.

We've processed these orders differently – hand holding them and removing all barriers to completion.

The aim was to reduce the need for customers to escalate, as well as reduce failed days.

We completed RCA and used the data to eradicate root causes and further failure.

Outcomes

✓ Total number of days of failure in the workstack reduced by 37%.

✓ Seen a reduction in high level escalation volumes of 53%.

✓ We now have a series of root causes to focus on.

✓ NPS results and direct customer feedback (lag measure) reflects that the complex EAD stack is improving and Openreach are easier to work with.

Problem order team impact on customer escalation volumes

HLE volumes
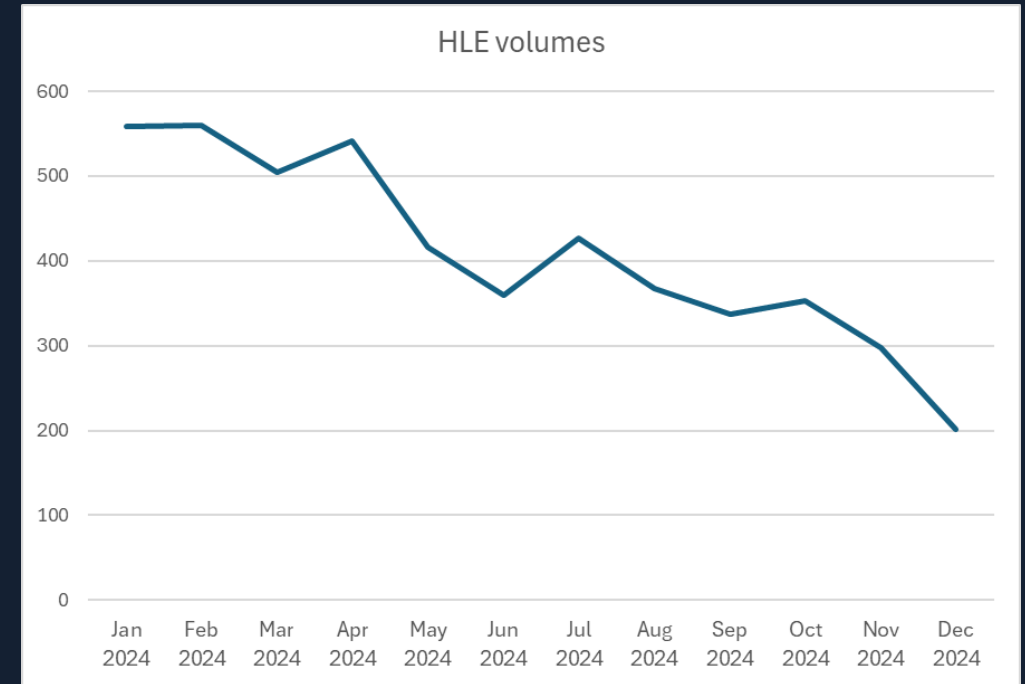
What's next

We're expanding the approach - so a specific team of individuals will:

- Proactively review orders as they approach CCD or become a failure risk.

- Review orders earlier in the process so that we eradicate failure altogether.

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Openreach Reporting replacement

Hardev Sroa

ORDATAA-18190

Reporting hub
New app to download reports

- The current OBI EE Dashboard Reporting app being retired and will be replaced by a new Reporting hub app

70 CPs | 130 users

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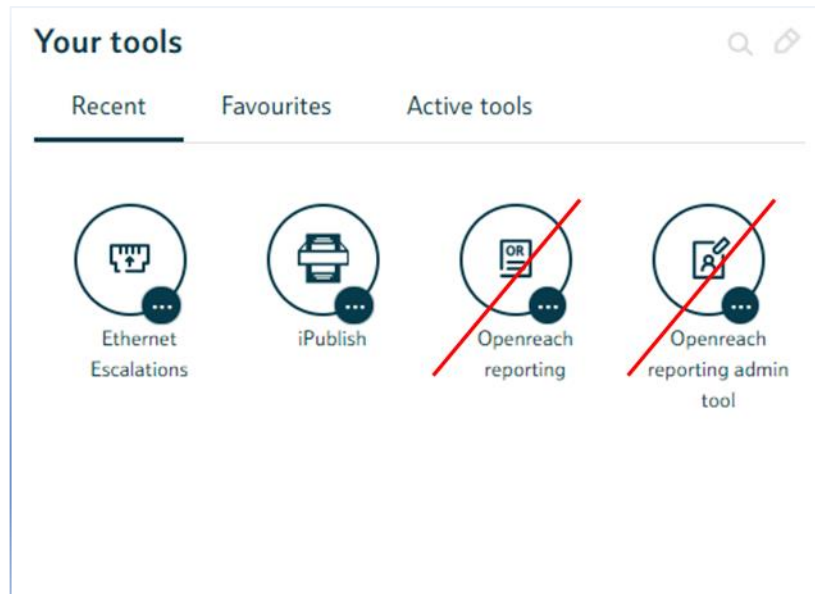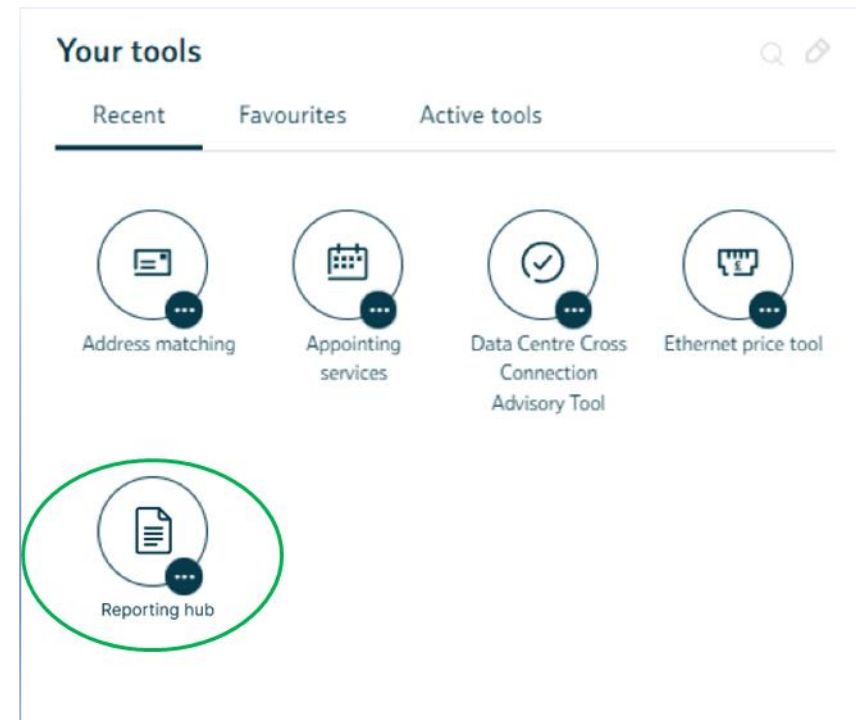
Delivery

New app functionality to be delivered in stages

Day 1 – Estimate March 2025	Day 2 – TBC
• New app Reporting hub launched • PIA reports available for existing users • PIA Fund details report consolidated	• CP Admin functionality fully launched • New users can be added to the Reporting hub app • All product reports available

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Openreach Reporting

Existing app – screenshot and report review

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Openreach Reporting

Report review

Reports review

- Approximately 100 reports on the existing app
- Many show very little or zero usage
- We have reviewed the reports internally
- We have marked reports to be retired
- Based on the data, once we remove the reports we will create, the remaining look like occasional users

Next steps
- **CP Action:** Review the list and add a note of you still want the report
- **Openreach action:** Will work with the account teams and reach out to the users and ask if the report is still needed

Microsoft Excel
Worksheet

Openreach Reporting

Existing app - screenshot

Reporting hub

Sample screen 1

- You will be able to view all your reports based on the Report category (formally Dashboards)

- The data will be updated daily

- You will be able to download the data as CSV files

Reporting hub

Sample screen 2

- We will show progress of the download

- The downloaded file will be called "DUNS_Report_name_datestamp"

Reporting hub

Sample screen 3

- You will be able to filter reports

- You will be able sort reports

- You will be able to select the number of reports you can see on a page

- You can navigate from page to page if you have many reports

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CP Admin functionality

- Managing the Reporting hub will be part of your CP Admin screens
- Granting access means you can add Report categories and the user will be able to launch the app and see the reports
- Modify will allow you add or remove the Report categories
- Remove access allows you to remove all the Report categories and the user will no longer see the app on their Dashboard

Next steps

Communication

- Copper and Fibre Process Group
- Ethernet Industry Working group
- PIA industry forums
- Add to EIP
- Publish briefing

Business readiness

- Update Customer Success and Client Managers
- Update CSOC and ASD

Rollout

- Publish a briefing with a Go Live date
- Email all existing users and advise them to start using the new Reporting hub app
- Dual run existing and new app
- Close existing app after CP Admin functionality delivered

In commercial confidence

Salesforce Case Management Integration

Abi Larkin

March 2025

Salesforce Case Management Integration

Customer Facing Changes

31st January 2025

Version 5

Customer Facing Changes

Why are we doing this?

What the change is:

Our current case management system is end of life; we are replacing it with Salesforce. As an Industry leading solution, we've built on it to improve our case management application to enable further efficiency in our Ethernet Service Desk, reducing complexity.

Why the change matters:

We need a new system to support industry. It also provides additional capability allowing use to reduce

- The time to triage and handle inbound customer cases

- Be more effective in resolving complex issues.

When the change will happen:

24th March

What Salesforce will provide:

▪ Efficient handling of cases via Skills Based Routing, automatically assigning a case to the most skilled, available agent.

▪ Live resource allocation, to flex resource to meet the day to day demands of our customers.

▪ Enhanced reporting and rich dashboards to view case handling in real-time and gain valuable insight from trended data over time.

▪ A flexible platform to enable we better answer Industry needs, as challenges and opportunities arise.

▪ Emails will continue to include update content

Change Overview
How to be ready

How to Engage:

Please let us know if you would like a walk-through session.

What to Expect:

We'll provide:

- A Summary Briefing
- Updated User Guides for the Apps
- Updated CSP (+online HLE process)
- Handy Helper for HLE
- Email Campaign for Case Owners

HLE Escalation Process

2.3 In-Application Access to HLE

- In the Ethernet Escalation App an open Escalation case can be progressed to HLE, using the HLE radio button
- The App validates the HLE request against the business rules, published in the CSP
- If an Escalation (Level 1) has had not been raised or been open for 24hrs prior to High Level Escalation Team (HLE) engagement, then a validation message will be shown

Raising HLE before Escalation

Error Message: Level 1 to HLE in under 24hrs

What	Why	Benefit/Impact
1. All Applications		
1.1 Application Names will be updated	Clearer names for some Applications	Benefit: better reflection of the Applications function
1.2 Case owner name becomes **one field**	Salesforce has a single field to accept the full name	Benefit: CP enters their name in one field instead of two
1.3 DSO Cases will **now be visible**	DSO Cases weren't previously visible outside of the DSO app	Benefit: Customers can now see DSO cases in context, reducing
1.4 In the last step of raising a case (optional attachments) there is **no Back button**	To enable the case in Salesforce and the upload to be linked once submitted	
2. Ethernet Escalation App		
2.1 Alternative Email Contact field only accepts **one email**	Salesforce has an email address and an alternati but no function to hold many alternative emails.	
2.2 **In App Option** to raise an escalation case to HLE	The email process is time consuming and due to currently results in a second case. Ethernet Escal always had a HLE option, which is now integrate	
2.3 **Validation that an Escalation** has been raised and worked for 24hrs prior to High Level Escalation Team (HLE) engagement	Validates the HLE request against the business r the CSP	
2.4 Search Function: **Returns one less column** "next update" in results table, includes Full Name	Limitation of Salesforce (9 columns)	

Change Overview

What is affected

View My Job	Ethernet Escalations	DSO	Case Email Templates

EAD
Dark Fibre
Cablelink

All Ethernet
Products

All Ethernet
Products with
DSO Offered

All Ethernet
Products

In commercial confidence

Change Overview

High-level changes are needed in the Openreach Portal to enable integration with Salesforce Case Management.

What	Why	Benefit/Impact
1. All Applications		
1.1 Case owner name becomes **one field**	Salesforce has a single field to accept the full name	Benefit: CP enters their name in one field instead of two
1.2 DSO Cases will **now be visible**	DSO Cases weren't previously visible outside of the DSO app	Benefit: Customers can now see DSO cases in context, reducing unnecessary cases into Desk when the Order is under DSO management
1.3 In the last step of raising a case (optional attachments) there is **no Back button**	To enable the case in Salesforce and the uploaded file in Transflex to be linked once submitted	Cases can be edited post submission and attachments updated.
2. Ethernet Escalation App		
2.1 Alternative Email Contact field only accepts **one email**	Salesforce has an email address and an alternative email address but no function to hold many alternative emails.	Impact: Simplifies communications and information flow.
2.2 In App Option to raise an escalation case to HLE	The email process is time consuming and due to SI set up currently results in a second case. Ethernet Escalation App has always had a HLE option, which is now integrated with Salesforce	Benefit: reduced touch times for customer Order Managers
The existing email process will remain in place
2.3 Validation that an Escalation has been raised and worked for 24hrs prior to High Level Escalation Team (HLE) engagement	Validates the HLE request against the business rules, published in the CSP	Benefit: standardises the HLE requests coming into Openreach.
The existing email process and escalation contacts will remain in place for exceptional circumstances
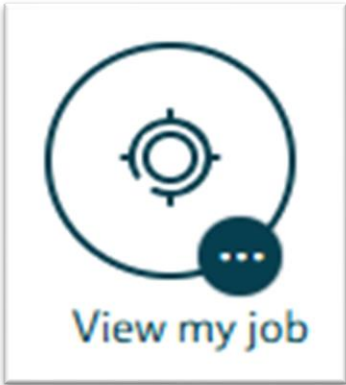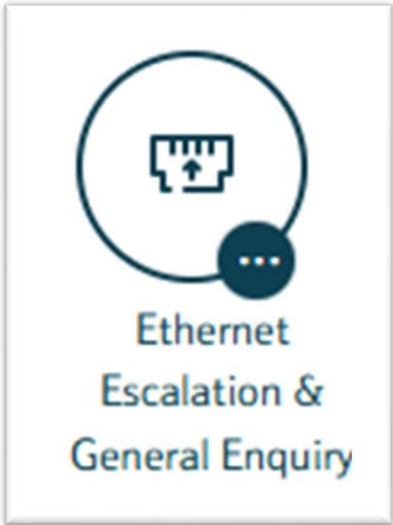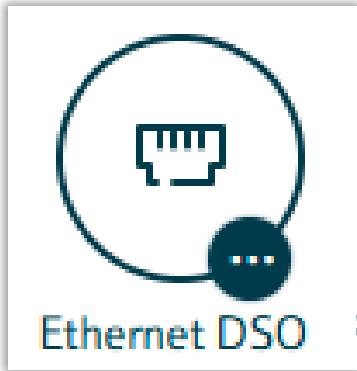| 2.4 Search Function: **Returns one less column** "next update" in results table, includes Full Name	Limitation of Salesforce (9 columns)	Benefit: cleaner presentation of search function
2.5 Application Names will be updated	Clearer names for Ethernet Escalation	Benefit: better reflection of the Applications function

Change Overview

High-level changes are needed in the Openreach Portal to enable integration with Salesforce Case Management.

What	Why	Benefit
3. DSO Application		
3.1 Validation to ensure the DSO case has the mandatory attachment (sign off)	Validates the DSO request against the business rules, published in the CSP	Benefit: standardises the DSO requests coming into Openreach
3.2 Alternative Email Contact field **only accepts one email**	Salesforce has an email address and an alternative email address but no function to hold many alternative emails.	Impact: Simplifies communications and information flow.
3.3 Removed **unused fields** from the DSO form	Reduce confusion and unnecessary information	Benefit: simplify DSO entry for CPs
4. View My Job		
4.1 Case Types and Case Categories	The case types reduced from fifteen to five. Moved from product specific to product agnostic.	Benefit: shorter, clearer options for CPs to select.
4.2 Notes Section loads in **compression**	Technical requirement to reduce the time taken to load the page	Benefit: fast initial page load for CPs Impact: to read the full notes, you will have to click to expand the section
5. Email Templates		
5.1 KCI Email Templates will change slightly	Emails will be generated by Salesforce instead of Single Interface, example cases will be provided	Benefit: Aligning to a single system
~~5.2 Case Update Emails **will not contain update content**~~	~~Emails will provide a hyperlink to the system so updates can be securely viewed~~	~~Benefit: Increases the level of security when providing updates~~

Content will be included

Appendix

Changes in Detail

Validation of Cases

Are there any limitations on raising cases?

The below table summaries the when a further case can be raised to the desk for triage and consideration.

The business rules (published in the Ethernet CSP) detail when we will accept and reject cases – but we know exceptions occur, so an Agent will check cases and give feedback. The only exception is for DSO, as the team will manage the progress of the order – so further GE and Escalation cases are unnecessary while it is open.

Initial Case	Further Cases				
	FND CE General Enquiry	FND CE Escalation	FND CE DSO	FND CE Responding to Delay	FND CE Amendment
FND CE General Enquiry	Y View Case + Add Case	Y View Case + Add Case	Y View Case + Add Case	Y Add Case	Y Add Case
FND CE Escalation	Y View Case + Add Case	Y View Case + Add Case	Y Add Case	Y Add Case	Y Add Case
FND CE DSO	N View Case	N View Case	N View Case	Y Add Case	Y Add Case
FND CE Responding to Delay	Y Add Case	Y Add Case	Y Add Case	Y Add Case	Y Add Case
FND CE Amendment	Y Add Case	Y Add Case	Y Add Case	Y Add Case	Y Add Case

Changes in All Portal applications

Common Changes

1.1 Case Owner Name becomes one field

1.3 Documents can be optionally attached in the last step/screen of raising an order, at this point a 'back' function is not available

Changes in All Portal applications

Common Changes

1.2 DSO Cases will now be visible

Ethernet Escalation Application

Application Specific Changes

2.1 Alternative Email Contact field only accepts one email

2.4 Search Function: Returns one less column "next update" in results table, includes Full Name

HLE Escalation Process

The new escalation case type

- Escalation options are unified in one case type, with 3 levels of flexible escalation. This maintains a single case history and improves handling.

- A case moves through the standard Escalation – HLE – Exec journey as today but can be raised directly to a level at need by our Desk.

- Changes of level are recorded in detail to deliver metrics and insight on escalation performance

- Exec cases will be raised direct to Level 3 by the Exec team as part of the BAU Exec process.

- The existing email process will remain in place – we'll regroup via IWG after at least one month to assess the new process and agree any adjustments

- This doesn't change our escalation contact points. They continue to be available to respond as today.

- The CSP will be updated to include the new process, along with a briefing

HLE Escalation Process

2.3 In-Application Access to HLE

- In the Ethernet Escalation App an open Escalation case can be progressed to HLE, using the HLE radio button

- The App validates the HLE request against the business rules, published in the CSP

- 2.4 - If an Escalation (Level 1) has had not been raised or been open for 24hrs prior to High Level Escalation Team (HLE) engagement, then a validation message will be shown

Raising HLE before Escalation

Error Message: Level 1 to HLE in under 24hrs

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Changes in All Portal applications

Common Changes

2.5 Application Name change

Becomes

Ethernet Escalation → Ethernet Escalation & General Enquiry

No Change

Ethernet DSO

No Change

View my job
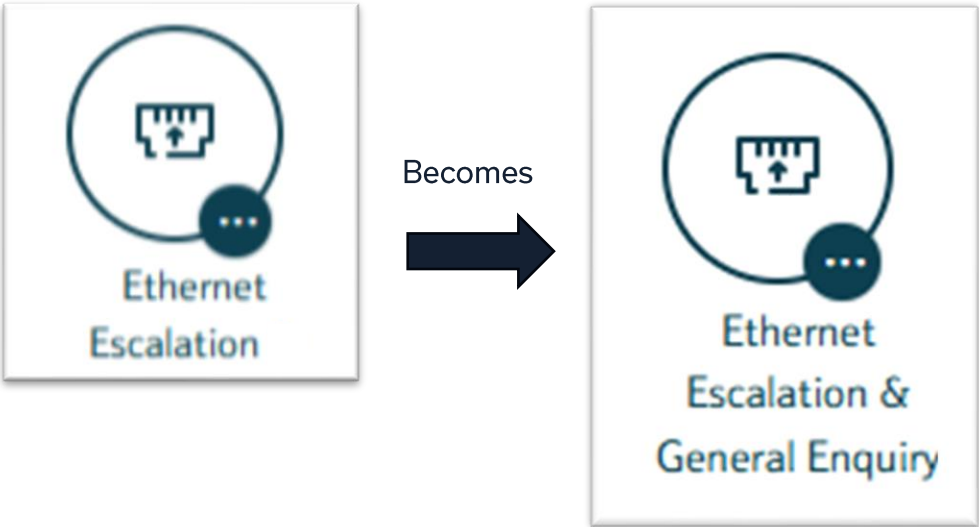
Migrating to Salesforce

Asks while we run our systems in parallel

On Salesforce deployment, all new cases will be open there. We will run both Case Management Systems in Parallel for some time as cases are resolved and close in SI and the open workstack grows in Salesforce. SI will continue to be available to provide case history across orders.

- Legacy Single Interface case IDs have the format "Cxxxxxxxx"
- New Salesforce case IDs have the format "0000xxxx"
- The process to raise and engage with cases of all types remains the same – with the addition of the new in APP HLE process. This is only available for new Salesforce cases.
  - For legacy SI HLE cases, please continue to use the Email Based HLE process until closure.

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DSO Application

3. Application Specific Changes

- Alternative Email Contact field only accepts one email

- The following fields have been removed

  - Fast Track Reference
  - Ofcom Referral Reference
  - If you already have an escalation reference, please provide
  - I agree to pay TRC's
  - Has Openreach failed a previous date commitment?
  - What action have you taken to escalate this issue?'

- Adding a sign off attachment is now mandatory, otherwise the case will be rejected

Account Information

Company name	DUNS Id	Your full name	Email address
TAG CP1	977777777	TAG	tagcp1@bt.com

Contact number	Contact name	Alternate contact number	Alternate email address
46584926982			

Information related to end customer

Your customer name this issue relates to*	What is their contact number?*	Whom do we contact on site*
Lorem	9876543210	Lorem

Information related to the issue

Product	Circuit ID related to the issue	Please confirm we have full access to your customer's site	Please provide access date and time if restricted
Ethernet	112233	Yes	Lorem

Business Critical Date	Status
28/07/0024	Open

Tell us what the problem is, including a summary of what has occurred and rationale for DSO involvement

Lorem

What do you want us to do?

Lorem

Home > Openreach dashboard > Ethernet DSO SF

Ethernet DSO SF

Create case   Search case

Add your sign off attachment and any supporting email chains.

To finalise your DSO request, you must attach the sign off from a director or pre-authorised elected representative from within your organisation.

The Director (or equivalent in your business) sign off, must be clearly identifiable and on an email chain for audit purposes. This needs to contain the full email signature of the person who is signing off the DSO request.

If you cannot supply the required information, then please use our existing escalation channels.

For further information on our escalation channels and the full DSO process, please refer to the Customer Service Plan.

Add attachment

View My Job Application

4. Application Specific Changes

4.1 Case Types and Case Categories

We've streamlined our Case Types and Categories, making them Product agnostic and removing duplicates and the obsolete. This simplifies access to the right case type on the right product. We've reduced case types from 15 to 5 and the subsequent categories are clearer to.

The new Case types are prefixed with FND CE - we've aligned our Salesforce implementation closely with our colleagues in Service Delivery and this prefix identifies the ethernet case types:

1. General Enquiry
2. Escalation
   - Level 1 – Escalation
   - Level 2 – HLE
   - Level 3 – Exec
3. PONA Amendment
4. Responding to Delay
5. DSO

4.2 Notes Section loads in compression

CASE TYPE	CASE CATEGORY
General Enquiry	Additional order/circuit information
General Enquiry	Other
General Enquiry	Cancellation query
General Enquiry	ECC
General Enquiry	Requesting a progress update
General Enquiry	TRC
General Enquiry	Product cost
Escalation	Missed ECD/KCI milestone
Escalation	Failed order delivery date
Escalation	Requesting a rapid rearrange
Escalation	Failed customer management enquiry
PONA Order Amendment	Customer Requested Change
Responding to delay	Challenge resilience violation
Responding to delay	Updating the delay
Responding to delay	Closing the delay
Responding to delay	Requesting a delay update
DSO	N/A

Date	Filename	Uploaded By	Actions
18-Sept-2024 07:24:09	test.docx	tagcp1@bt.com	👁 ⬇ 🗑
3-Sept-2024 06:07:03	a2.jpg	tagcp1@bt.com	👁 ⬇ 🗑
Case history			

Ok   Respond to case

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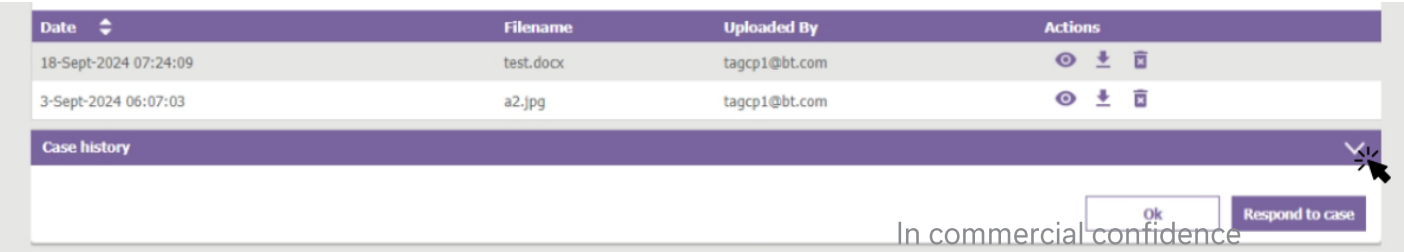
- The case history section will be collapsed by default and can be expanded when the arrow is pressed

✓ Collapsed view is designed to speed up the user experience to reduce time for the information to display

Email Templates

5. Changes to Case KCI Emails

5.1 KCI Email Templates will change slightly as emails will be generated by Salesforce. Formats and Examples will be provided for:

- Case Creation
- Case Updated
- Case Closure
- Case Rejection

5.2 Case Update Emails will not ~~~ portal will allow updates to be a~~~

Email Subject: Case ref: / Circuit Ref - Case Update

Hello,

There has been an update on your case [Case number]

Please login to your Openreach customer portal to view this update.

~~~u need to contact us again about this issue, please use this case

~~~ach
~~~enreach
~~~ Escalations – Openreach
~~~0 – Openreach

> Due to Industry feedback, we propose not implementing this change.
>
> Standardising the email contacts reduces the risk initially and we'll bring reducing overall email content/information security to Industry for discussion and agreement; alongside portal and API changes to support further efficient case management.

Go Direct

Abi Larkin

March 2025

Go Direct

Opt In for Better Appointment success

Summary and Benefit

- Go Direct will introduce new process where CPs will be given an opportunity to tell us if they would like the Site contact to be directly contacted (via SMS primarily) or not, by setting the "Go Direct" flag.

- Direct communication with the Site Contact will validate site contact details upfront, before going ahead with survey/engineering task.

- Go Direct smart conversations will then assure the Site is prepared for the appointment and aware of what to expect on the day - ready to make that appointment a success.

Products impacted

- EAD, Dark Fibre

Impact summary

- CPs will be able to set and manage the "Go Direct" flag via CP Establishment process. If the flag is set as "Y", then for all the orders from that CP will be using the direct communication with the Site Contact. If not requested explicitly, then the default value for this flag will be set as "N".

- CPs will also be able to make the choice per order, by using thee Go Direct flag on SABOR Portal while placing the order (defaults to CP flag if not changed).

Release

- R5800 March 2025 for validation and Survey Assurance

Action required

- Go Direct is optional but offers an opportunity to avoid the aborted site visit charges and subsequent delays resulting from failed appointments, where the site isn't fully ready for the work. Please prepare to opt in and provide site contact details to take advantage of these benefits where you can.

Go Direct: The Proof of Concept
Summary of Findings

| 1. Direct customer engagement | 2. SMS reminders and preparation for end customers | 3. Agreeing new survey appointments | 4. Telling customers what we're going to do in advance | Result Better on the day completions |

We're wanted to prove if this technology would:

- Improve survey success on the day performance
- Reduce delays in P1/P2
- Reduce propensity to contact Service Desk in P1/P2

The trial asked customers to:

- Provide direct customer contact details for up to 1,000 contacts
- Action any incorrect contact details highlighted in responses

After 606 Orders:
This POC showed there is a better way of doing things and it involves using technology we all see in our personal life. We saw a positive impact within the end-to-end order journey.

Performance impact:
- **Delay performance** (P1&2) was reduced by 3.6 days for the CE journey orders
- **Survey Performance** was c.5% better (success on the day) against baseline
- **Propensity to Contact** (P1&2) was c.20% less for CE journey

All these measures drive less volume of touch points across industry

Typical Appointment Journey

What happens today when the Appointment needs to Change

1. Customer requires a new appointment

This stage may involve multiple engagements to agree and book a new date

2. Application/DC team

3. CP requests dates

4. CP engages with customer

5. Responds back to confirm appointment

6. Request delay is closed

Go Direct allows customers to request a date change.

We can respond to these requests and book a visit with the end user. Thus, removing the application for Deemed Consent, calling Service Desk, providing dates to CPs, waiting for a response, confirming appointments and removing delay.

For appointment issues - We **Go Direct** to the customer and agree new survey (engineering) dates.

Go Direct
Points to Note

- On course to integrate our messaging services with Smart Messenger which will enable us to send these messages from 'Openreach'.

- Message text will be aligned with our Direct End Customer Contact service (SD).

- The Order Level Go Direct Flag can't be amended as the order progresses - but Contact Details can be as normal.

- We'll be supporting Early Adopting CPs through their initial Go Direct Interactions to give assurance and drive any early life improvements

- Look out for an industry briefing and supporting information on the portal

- We'll be updating the relevant product documentation – and publishing the conversation processes for your reference

Hi Gemma, it's Openreach on behalf of Neos. Just to remind you, we will be visiting on 4th December at 1pm at ▓▓▓▓. This is for order ONEA▓▓▓▓. For our visit to be successful, someone will need to be on site on this day - to provide entry to the site itself, access to the equipment room and show your asbestos register to the engineer. Is the date and time of your appointment still suitable? Please reply YES or NO

Validation Conversation SMS

Resolving the unhappy paths

Hi (Contact Name) this is Openreach on behalf of (insert CP name). We have received your order for an Ethernet service (insert order number) at (number/street), (postcode) and want to check some details.
Please can you confirm YES if you are the correct contact for us to speak to about visiting the site? If not please reply NO.

N

Y

Thanks. Can you confirm the correct site address is (number/street), (postcode)? Please reply YES or NO

N

Y

Thanks. Can you confirm the correct location of the equipment is floor 3? Please reply YES or NO

N

Y

Thanks for confirming. The team will continue to progress your order

Conversation End

Thank you for your feedback; we will pass this onto one of the team.

Planning Team: Genesys Queue

Assess Response: Notify CP using: BAU Delay Process: DC7E* and DC7I** as per BAU process

KCI : Delay encountered - customer deemed consent

Delay Notes: Inc Conversation Text

* Insufficient Information
**Invalid location attributes

Survey Reminder/Confirmation Conversation SMS

Resolving the unhappy paths

Appointment Continues as planned

Can Resolve directly with End Site Contact

KCI : Delay encountered - customer deemed consent

Delay Notes: Inc Conversation Text

Notify CP using: BAU Delay Process*

Need CP Support to Resolve

Survey Booking Team: Genesys Queue

Thank you for your feedback; we will pass this onto one of the team.

Hi (Contact Name), it's Openreach again on behalf of (insert CP name). Just to remind you, we will be visiting on (date) at (time) at (number/street) (postcode)

For our visit to be successful, someone will need to be on site on this day - to provide entry to the site itself, access to the equipment room and show your asbestos register to the engineer.

Is the date and time of your appointment still suitable? Please reply YES or NO

N

Y

Are you the site contact who can escort the engineer? Please reply YES or NO

N

Y

Can you give access to the surveyor for the whole site including the comms room? Please reply YES or NO

N

Y

Do you have access to the asbestos register? Please reply YES or NO

N

Y

Do we need any special access or permits to access the site? Please reply YES or NO

Y

N

Thanks for confirming. We will see you then.

Conversation End

KCI: Appointment Booked

Amend Appointment with End Contact

Amend Appointment Booking

AND

KCI : Delay encountered - customer deemed consent Delay Notes: Inc Conversation Text

Notify CP using: BAU Delay Process: DC7M Not been possible to arrange appointment within...

* eg DC7E – Insufficient Information/safety info

Appendix

Additional Slides for Reference

Go Direct

Strategic design - opting in SABOR screenshot

Validation Conversation SMS

How will the validation check work?

Once the order is received, KCI1 will be sent to the CP, then we will Go Direct and begin the validation conversation.

We will have 1 attempt using the initial contact details provided to send the validation SMS.

Positive Response	No Response	Negative Response
↓	↓	↓
No further action; order continues	No further action; order continues	The BAU delay process - trigger delay KCI back to CP for updating contact details
		↓
		Contact details updated and order continues →

We won't check the amended contact to avoid the order getting stuck in a loop of delay

Go Direct Timelines
When will the SMS be sent?

Go Direct is complimentary to the BAU KCIs and will run in parallel.

- Validation SMS – once the order is received into Planning
- Survey Reminder SMS – 3 days before survey appointment
- Build Reminder SMS - 3 days before build appointment
- F&T Reminder SMS - 3 days before F&T appointment

- All appointments will also receive a static (no need to respond) SMS reminder 1 day before their appointment

Open Actions

Michelle Delaney

March 25

Open actions

March 2025

Number	Status	Area	Action	Update	Owner
IWG-34	Open	EAD2	Openreach to take away discussion about data centres and MPA.	3/12 Mark Hitch to speak to Mark Dalziel and get a data centre session planned in the diary 5/11/24 Ongoing, awaiting best timing of slot 2/10 Being scheduled, noting will have customised passive device for DCs to be discussed in session. 3/9/24 Data centres session still to happen, ongoing 5/8/24 Session planned by Mark Hitch for w/c 12/8 2/7/24 Ongoing 7/5/24 Ongoing 2/4/24 To be wrapped into Mark Dalziel's wider data centre discussions and session. 5/3/24 Raised	Mark Hitch
IWG-47	Open	Modify, cleansed NAD keys	Data cleansing the synchronisation mismatch between NAD keys	4/3 Verbal update to be given in March 25 IWG 3/12 Verbal update to be given on December IWG 5/11 Update given on position and plan. OSS change is requested and being assessed. 2/10 to be covered in November IWG 3/9/24 raised	Robert Richards
IWG-50	Open	EAD2.0 Optical Reach	Openreach to investigate timing of roadmap, dependent on OSS development	28/2 Obtaining OSS development cost potential timescales 3/12 Ongoing 5/11 Raised	Mark Hitch
IWG-52	Propose close	IWG Recording	Ask around whether future sessions can be recorded and shared	4/3 Propose closure as agreed session recorded. 3/12 Ongoing 5/11 Raised	Jon Taylor

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Open actions

March 2025

Number	Status	Area	Action	Update	Owner
IWG-53	Open	EAD 2.0	Does Sabor take-into-account Silver address keys?	4/2 Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-54	Open	EAD 2.0	OR to address and clarify when OVD commences and update Slide 8 in the pack used.	4/2 Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-55	Open	EAD 2.0	OR to clarify if this include re-costing activity – i.e. if customer says they will do ducting	26/2 -Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-56	Open	EAD 2.0	OR to have a bi lat with PXC regarding KCI2 position	26/2 -Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-57	Open	EAD 2.0	OR to share delay matrix with Industry	26/2 -Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-58	Open	EAD 2.0	Bi lat to be scheduled with James at Connect fibre	26/2 -Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-59	Open	EAD 2.0	OR to share delay data on EAD today.	26/2 -Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-60	Open	EAD 2.0	Bi lat with Stuart Quinn VF to be arranged around delay stacking example	26/2 -Raised - EAD 2 team to investigate	Kirsty/Mark/Michelle
IWG-61	Propose to close	Cablelink Service Connect	Andy B to set up a bi lat with Callum at PXC.	3/3/25 Confirmed by Andrew session will take place in March and action can be closed 26/2 Raised	Andrew Butler

AOB

March 2025

Thank you

openreach