



Service and Software

Echo has been established for almost 25 years delivering customer service and software solutions to water utilities in the UK, Australia and USA that support and enhance their customer operations. Broadly, this incorporates outsourced customer service solutions including customer contact handling, billing, meter reading and debt collection, as well as developing, implementing, and supporting billing and CRM software.

Market conditions this financial year had an optimistic outlook compared to the previous year. In the UK Echo supported clients with efficiency and optimisation aspirations in readiness for AMP8, although the cost-of-living continues to impact clients in both bill affordability and debt collections.

The Australian market is active, and customers are seeking a more packaged approach to systems migration, something that Echo is able to deliver through is Aptumo, Salesforce native Customer service and Billing solution. Echo held another Australian Client Forum in Wadonga, which further enhanced this view. Furthermore, the various state-based regulators are continuing to place greater emphasis on customer centric service models, which are delivered and supported with carefully managed and augmented data to deliver a more personalised customer experience.

This aligns with the inherent benefit of selecting Aptumo on Salesforce. In the US, the utilities many are coming to end-of-life systems or ageing and expensive on prem CIS & billing solutions and are actively looking for pre-packaged cloud-based solution with an increased focus on making it easy for customer to interact and robust revenue management processes that are core to the billing system solution.

Overall, Echo delivered a good performance during the year, supporting its existing clients and making further progress in its global expansion in both Australia and USA. In the UK, following the renewal of Welsh Water and the ongoing systems upgrade to Aptumo with another UK large water and sewerage company client both on track and on budget.



Strategic direction

Echo has a strong reputation and lengthy proven track record as a trusted service partner to water utilities. Our strategic direction remains one of continued growth across the UK, Australia, and the USA, providing leading utility billing solutions.

Aptumo, Echo's innovative customer billing software, continues to present growth opportunities for the business both in the UK and overseas. Together with our Echo India team who provide extensive utility support solution and business intelligence services via our subsidiary in Delhi, India and Customer and Collections Service side of the business, we can offer significant transformation opportunities for clients.

Echo continued to support the UK and Australian water markets throughout the year, helping its clients transform their customer management systems to deliver a cost-effective and improved experience for their customers.

Northern Ireland Water (NIW) and a large UK water company became Echo's third and fourth clients in the UK to choose Aptumo, the company's next-generation, cloud-based billing and CRM software, helping them to simplify processes, offer customers more choice in how they communicate with the company, and deliver more self-serve options to further improve customer service. The 10-year contract secured last year with Echo's longstanding client NIW, saw the commencement of Aptumo implementation, which is alongside Echo's end-to-end customer service provision.

Echo continues to strengthen relationships with clients in Australia with two Client Forums held across the calendar year. Complemented by sponsorship of the Vic Water conference, Echo is playing an increasingly important role in the Australian water sector. Nurturing of key prospects is beginning to bear fruit with a growing pipeline of opportunities for the Aptumo product in the region. To support upcoming opportunities, Echo has established a robust partner network including a relationship with Salesforce that is increasingly strategic and win/win in nature.

Expansion planning for the USA markets has continued resulting in accelerated frequency of responses to business development and tender opportunities and a growing capability of our strategic solution integrator partner. The pipeline of near- and medium-term opportunities continues to increase as does the diversity of opportunities unique to the USA market. Tailored business development approaches have been developed to cater for these unique opportunities. A strengthened offering with a focus on core Salesforce capabilities and products has been central to an improved pipeline and tender response quality.

With growth prospects continuing to increase in our emerging markets of Australia and the USA, and qualified opportunities remaining in our established market in the UK, Echo has focused on developing deeper understanding and capabilities at a regional level. This has included identifying and incorporating regional nuance in our core product offering but also establishing partner networks that support the unique needs of each region. It is pleasing to see the growing appetite within our partner network to work with the Aptumo product and the wider Echo team; a positive indicator of the potential in our emerging markets.

Echo has continued to support its clients Cambridge Water and South Staffs Water (SSW) in their joint ambition to deliver an excellent customer experience and has managed to maintain a mid-C-MEX table performance despite the cost of living a debt challenge that has impacted the volume of customer contacts throughout the period.

Echo is now coming to the end of a transformative billing solution implementation for its client NIW. Whilst there have been delays at the implementation stage, both parties are confident that Echo's innovative market leading service and software solution will help NIW with their ambition to deliver world-class customer service.

Echo India Managed Services, our wholly owned offshore operation, continued to grow in the last year with new processes onboarded within our business process outsourcing (BPO) operation as well as increased numbers of employees to support software implementations and support IT delivery projects for the Group. The business has recently moved to the new ISO27001 2022 standard and has again been recertified as a 'Great Place to Work' for the 2nd year running. With an ambitious growth strategy covering the next 3 to 5 years we expect the operation to continue to grow supporting offshoring services for Echo Managed Services, the wider Group, as well as moving into BPO offerings beyond the Group to external clients.

Looking to the future

The global demand and future for billing platforms in the water sector is experiencing significant growth, driven by factors such as digital transformation, smart metering, cost reduction and the need for enhanced customer service.

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Cloud-based solutions such as Aptumo are and will gain traction due to their scalability and cost-effectiveness.

There are multiple market drivers that are driving this future growth that Echo is looking to leverage as part of its future growth strategy and product road map: -

- **Digital Transformation:** Utilities globally are modernizing legacy systems to improve operational efficiency and customer service.
- **Smart Metering:** The adoption of smart meters provides real-time data, enabling accurate billing and helping customers monitor their consumption.
- **Regulatory Compliance:** Stricter regulations and the need for data security are prompting utilities to invest in advanced billing solutions.
- **Customer Expectations:** Consumers demand more transparent billing, easy access to account information, and responsive customer service.

Moreover, in the water industry, offshoring has shown it can offer utility companies numerous strategic and operational benefits, especially in areas such as customer service, billing, IT support, and back-office operations. This is where Echo India is well placed to support future long growth as it can offer the benefits of lower labour costs, scalability and flexibility, highly skilled talent – an offering that is being reviewed as part of the Echo growth strategy to support long term ambitions of becoming more entrenched with its customers.

Finally, innovation. This is critically important in the UK water industry and will be a central part of the Echo future thinking. The need to innovate and think creatively is due to a unique convergence of regulatory pressures, environmental challenges, customer expectations, and aging infrastructure. The UK industry is facing a once-in-a-generation transformation underpinned by Ofwat's regulatory model and long-term goals like net zero and water resilience. The arrival of AI must be recognised as it changing the face of the billing landscape globally – something Echo is actively evaluating and exploring and how it can be integrated into its future portfolio.

With the development of clear value propositions, partner strategy, cloud-based technology – underpinned by Salesforce, scalable delivery and a BPO capability, it is the firm belief that Echo Managed Services is not only set up to succeed in the future - it's structured for market leadership.

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