
Overview

This standard is about those activities that are undertaken prior to a site visit and in preparation for the provision of commercial energy advice to clients.

It covers the promotion of energy advice services, the targeting of potential customers for the services that you offer, conveying key messages about potential benefits, and exploiting opportunities to promote energy advice services. It also covers responding to enquiries from prospective clients, clarifying their needs and expectations, and explaining the terms and conditions under which you can provide information, advice and on-going support as well as gathering organisation-specific data and information from the client and from other sources, such as Local Authorities, in order to build up a picture of energy use.

This standard is for professionals in energy management and advice.

Prepare for the provision of commercial energy advice

Performance criteria

Promote energy advice services

You must be able to:

- P1 identify the energy advice services that may be of interest to potential clients
- P2 identify the potential market for energy advice services and ways of engaging with that market
- P3 identify the key messages to be conveyed to potential clients including the value and benefits of energy advice services
- P4 provide information relating to energy advice services to potential clients
- P5 identify and exploit opportunities to promote energy advice services
- P6 respond to enquiries from potential clients and clarify the extent and limitations of the energy advice services offered
- P7 record potential client contact information in accordance with organisational and legislative requirements
- P8 confirm the interest of potential clients in energy advice services and agree appropriate follow up activities with them

Agree terms and conditions for the provision of energy advice

You must be able to:

- P9 establish the status of the client in relation to the organisation to be assessed
- P10 respond promptly to enquiries from prospective clients
- P11 clarify the requirements and expectations of the prospective client
- P12 explain to the prospective client the terms and conditions under which you will provide information, advice and on-going support
- P13 explain to prospective clients the limitations and constraints of the information, advice and on-going support
- P14 prepare and agree a scope of works which clarifies what is needed
- P15 agree the level of access and on-site support that will be provided during the assessment
- P16 confirm in writing the instruction and the terms, conditions and arrangements that have been agreed
- P17 identify any circumstances that prevent you from providing information, advice and on-going support and explain the reasons to clients politely

Prepare for the provision of commercial energy advice

and clearly

- P18 inform the client about any referral fees or other benefits that you may receive should they follow your suggestions for particular goods, services and/or suppliers

Gather data and information relating to energy consumption

You must be able to:

- P19 prepare a pre-site inspection list
- P20 establish what energy information can be obtained in relation to what is required
- P21 explain to clients the data and information that is required from them to enable analysis of energy consumption and agree when and how this may be provided
- P22 gather data and information from clients that is specific to them and their organisation in relation to: lighting; heating; cooling; water usage; insulation and glazing; air-tightness; electrical equipment and controls; use of commercial space; energy suppliers, tariffs and bills; energy performance documentation
- P23 identify regulatory requirements and financial support that are relevant to the client and their organisation
- P24 gather data and information from other sources that is specific to the client and their organisation
- P25 review data and information and check that it is relevant, consistent and complete
- P26 take the necessary action where data and information is inconsistent or incomplete

Prepare for the provision of commercial energy advice

Knowledge and understanding

You need to know and understand:

- K1 the purpose and role of commercial energy advisers and the information, advice and support that can be provided by them
- K2 how to clarify and conform to the requirements and expectations of prospective clients
- K3 when a potential conflict of interest will require disclosure to clients or will require the need to decline the instructions altogether
- K4 the limitations and constraints that apply to the provision of information, advice and on-going support
- K5 the importance of confirming in writing the terms, conditions and arrangements agreed between you and the client
- K6 fee structures and payment arrangements for the provision of information, advice and on-going support
- K7 how to identify and explain any circumstances that prevent you from providing information, advice and on-going support
- K8 the importance of disclosing any referral fees you may receive as a result of the client following your suggestions for particular goods, services and/or suppliers
- K9 the range of information that is required from clients in order to enable a thorough analysis of energy consumption and the ways in which this can be provided
- K10 the activities, products, services, systems and processes of the organisation and their impact on energy and carbon consumption
- K11 potential sources of external data and information that is specific to clients and their organisation and how to obtain that information
- K12 action to take where data and information is inconsistent and/or incomplete
- K13 sources of information about the regulatory requirements and financial support available, including carbon reduction commitment energy efficiency scheme

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