
Overview

This unit covers those activities that are undertaken prior to a site visit and in preparation for the provision of Home Energy Audit Reports to clients.

Element 2.1 covers the marketing and promotion of energy advice services. You must target potential customers for the services that you offer, convey key messages about potential benefits, and exploit opportunities to promote energy advice services. In addition, you must respond to enquiries from potential customers and clarify the extent and limitations of the energy advice services offered, record their contact details, and agree follow-up activities with those who express an interest.

Element 2.2 requires that you respond to enquiries from prospective clients, clarify their needs and expectations, and explain the terms and conditions under which you can provide information, advice and on-going support. You must explain any limitations or constraints that apply and confirm your fee and payment arrangements. Note that the *recommendations* provided to clients must be objective and impartial e.g. roof insulation is required, energy efficient light bulbs should be used, a condensing boiler should be installed. However, it is possible that you will be 'tied' to a particular organisation/employer and that you will receive referral fees or other benefits from them should the client use their services. Although you may make *suggestions* to clients that they use particular products, services or suppliers (e.g. a certain make of boiler, or a local insulation installation service), it is vital that any interest is fully disclosed to the client.

Element 2.3 requires that you gather property-specific data and information from the client and from other sources, such as Local Authorities, in order to build up a picture of household energy use. Data and information from the client could be provided via a questionnaire or telephone interview for example. You may wish to consider issuing energy monitoring equipment, such as home energy meters, as a means of gathering data on actual energy use.

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Performance criteria

Market and promote energy advice services

You must be able to:

- P1 identify the energy advice services that may be of interest to potential customers
- 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 **customers**, including the value and benefits of energy advice services
- P4 provide **information** relating to energy advice services to potential **customers**
- P5 identify and exploit opportunities to promote energy advice services
- P6 respond to enquiries from potential **customers** and clarify the extent and limitations of the energy advice services offered
- P7 record customer contact information in accordance with organisational and legislative requirements
- P8 confirm the interest of potential **customers** 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 respond promptly to enquiries from prospective clients
- P10 clarify the requirements and expectations of the prospective client
- P11 explain to prospective clients the terms and conditions under which you will provide information, advice and on-going support
- P12 explain to prospective clients the limitations and constraints of the information, advice and on-going support
- P13 confirm in writing the instruction and the terms, conditions and arrangements that have been agreed
- P14 identify any **circumstances** that prevent you from providing information, advice and ongoing support and explain the reasons to clients politely and clearly
- P15 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:

- P16 explain to clients the **data and information** that is required from them to enable analysis of energy consumption, and agree how and when this might be provided
- P17 gather **data and information** from clients that is specific to them and their property
- P18 gather **data and information** from other sources that is specific to the

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client and their property

P19 review **data and information** and check that it is relevant, consistent and complete

P20 take the necessary action where **data and information** is inconsistent and/or incomplete

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Knowledge and understanding

You need to know and understand:

Market and promote energy advice services

- K1 the range of energy advice services that may be interest to potential customers, and your ability to provide them
- K2 the different ways in which energy advice services and subsequent improvements can be supported and funded; the specific provisions for those in fuel poverty
- K3 the other sources of energy advice and the key services offered by them
- K4 the potential market for energy advice services, and the range of ways in which that market can be engaged
- K5 the key messages to be conveyed to potential customers, and how to highlight the potential value and benefits of energy advice services
- K6 the range of ways in which information relating to energy advice services can be provided to customers, and how to access and/or develop such information
- K7 how to identify and exploit opportunities to promote energy advice services
- K8 how to respond to enquiries from potential customers, and the importance of clarifying the extent and limitations of the energy advice services that you offer
- K9 how to record customer contact information, and the importance of doing so in accordance with organisational and legislative requirements (e.g. Data Protection)
- K10 how to confirm the interest of potential customers in energy advice services, and the importance of agreeing follow-up activities with them

Agree terms and conditions for the provision of energy advice

You need to know and understand:

- K11 the purpose and role of Energy Advisers, and the information, advice and support that can be provided by them
- K12 how to clarify and confirm the requirements and expectations of prospective clients
- K13 when a potential conflict of interest will require disclosure to clients, or will require the need to decline the instructions altogether
- K14 the limitations and constraints that apply to the provision of information, advice and ongoing support
- K15 the importance of confirming in writing the terms, conditions and arrangements agreed between you and the client
- K16 fee structures and payment arrangements for the provision of information, advice and ongoing support
- K17 how to identify and explain any circumstances that prevent you from

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providing information, advice and on-going support

- K18 the importance of fully disclosing any referral fees or other benefits you may receive as a result of the client following your suggestions for particular goods, services and/or suppliers

Gather data and information relating to energy consumption

You need to know and understand:

- K19 the range of information that is required from clients in order to analyse energy consumption; the ways in which this information can be provided (e.g. completion of a questionnaire, via telephone interview, issue of energy monitoring equipment)
- K20 the range of data and information required to enable a thorough analysis of energy consumption
- K21 potential sources of data and information that is specific to clients and their property (e.g. clients, energy companies, local authorities)
- K22 how to extract relevant data and information from clients and other sources
- K23 action to take where data and information is inconsistent and/or incomplete

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Additional Information

Scope/range

Market and promote energy advice services

- 1. customers:**
 - 1.1 existing
 - 1.2 new
- 2. information**
 - 2.1 written/printed
 - 2.2 verbal
 - 2.2 electronic

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- 3. respond:**
 - 3.1 face to face
 - 3.2 in writing
 - 3.3 by telephone
 - 3.4 by email
- 4. circumstances**
 - 4.1 diary pressures
 - 4.2 conflicts of interest

Gather data and information relating to energy consumption

- 5. data and information** relating to
 - 5.1 lighting, heating and hot water
 - 5.2 insulation and glazing
 - 5.3 household appliances, electrical equipment and their controls
 - 5.4 occupants' use of the home
 - 5.5 energy suppliers, tariffs and household bills
 - 5.6 Energy Performance Certificate (EPC) and underpinning data
 - 5.7 financial support available to implement measures to reduce consumption (e.g. grants)
 - 5.8 options for low and zero carbon technologies

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Suite Energy Advisers

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