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### Overview

This unit covers monitoring the implementation of recommendations by the client and the provision of any follow-up services requested by them e.g. further information and advice, encouragement and support, action planning.

Element 5.1 requires that you make contact with the client after they have received their Audit Report so that you can check their understanding of the report, review their progress and confirm their need for any follow-up service(s). You must encourage the client to assess their own progress and help them identify any barriers that may be hindering the implementation of recommendations. Follow-up services are delivered in an appropriate and timely manner, and clients are referred to other sources of information, advice and support as necessary.

An important component of this Unit is gathering data and information that enables the carbon and cost savings made by them to be quantified. You may wish to consider the use of energy monitoring equipment, such as home energy meters, as a means of monitoring actual energy use, and the use of questionnaires to monitor behavioural changes for example. It is recognised that monitoring will rely, to a large extent, on the evidence that is provided by the client and that, in some cases, such evidence may not easily be obtained. The Adviser is expected to work with clients to ensure that all reasonable efforts to monitor improvements are made, and to use prescribed software to calculate the carbon and cost savings achieved. Records of the actions taken by clients and the savings made must be kept.

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### Performance criteria

*You must be able to:*

- P1 make contact with client, after receipt of the Audit Report and as agreed with them, in order to:
  - P1.1 check their understanding of the report and any accompanying guidance
  - P1.2 review their progress with implementing recommendations against the action plan
  - P1.3 confirm their need for **follow-up services**
- P2 encourage clients to assess, and to record evidence of, their progress against targets, and to identify any barriers that are hindering progress
- P3 provide **follow-up services** to the client in a manner, and at a time and pace, agreed with them
- P4 direct the client to other sources of information, advice and support that may assist them with taking action to reduce energy consumption
- P5 gather evidence, in consultation with the client, that is required for the quantification of carbon and cost savings
- P6 use prescribed software to calculate the carbon and cost savings achieved
- P7 keep accurate, complete and up-to-date records of the actions taken by clients and the carbon and cost savings made by them

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### Knowledge and understanding

*You need to know and understand:*

- K1 the importance of making contact with clients following receipt of the Audit Report, and the reasons for doing so
- K2 the importance of making contact with clients at a time and frequency agreed with them
- K3 how to encourage clients to assess, and record evidence of, their progress against targets
- K4 the range of barriers that may hinder progress against targets, and potential ways starting point for discussion. of overcoming them
- K5 how to provide relevant follow-up services to the client, and the importance of doing so in a manner, and at a time and pace agreed with them
- K6 the types and sources of further information, advice and support to which clients can be referred to assist them with taking action to reduce energy consumption
- K7 the importance of gathering data and information that enables quantification of the carbon and cost savings made by clients
- K8 how and when to gather data and information that enables the quantification of the carbon and cost savings made by clients
- K9 the potential difficulties associated with gathering evidence from clients regarding the carbon and cost savings made by them; possible ways of overcoming these difficulties
- K10 how to use prescribed software to calculate the carbon and cost savings achieved
- K11 how to keep accurate, complete and up-to- date records of the actions taken by clients and the carbon and cost savings made by them

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### Additional Information

#### Scope/range

1. **follow-up services** may include:
  - 1.1. further information and advice
  - 1.2. encouragement and support
  - 1.3. action planning
  - 1.4. referral to other professionals
  - 1.5. recommending products, services and/or suppliers

# ASTEAS5

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**Relevant occupations** Professional Occupations; Construction, planning and the built env; Building and construction; Architects, Town Planners and Surveyors

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**Suite** Energy Advisers

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**Key words** recommendations, Audit Report, follow-up services, home energy meters, energy use, carbon savings, cost savings