
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 customers.

The standard includes promoting energy advice services to customers, conveying key messages about potential benefits, and identifying opportunities to promote commercial energy advice services. It also covers responding to enquiries from potential customers, clarifying their requirements, and explaining the terms and conditions under which information, advice and on-going support can be provided. The standard is also about gathering organisation-specific data and information from the customer and from sources, such as Local Authorities, to build up a picture of energy use.

This standard is for professionals in energy management and advice, working in an employed or self-employed capacity.

You will be required to know and understand the relevant requirements of each devolved nation.

Performance criteria

You must be able to: **Promote energy advice services**

1. identify existing and prospective customers to provide commercial energy advice services to
2. identify the commercial energy advice services that of interest the customers
3. identify the market for commercial energy advice services and ways of engaging with that market
4. identify the key messages to be conveyed to customers including the benefits of energy advice services to meet their requirements
5. provide information relating to commercial energy advice services to potential customers and respond to their enquiries
6. identify opportunities to promote commercial energy advice services
7. record customer contact information in accordance with the relevant organisational requirements and data protection legislation
8. confirm the interest of customers in commercial energy advice services and agree relevant follow up activities with them

Agree terms and conditions for the provision of energy advice

1. verify the requirements of the customer for commercial energy advice services
2. explain to the customer the terms and conditions under which information, advice and on-going support will be provided, and the fee structure and payment arrangements for these services
3. explain to the customer the limitations and constraints of the information, advice and on-going support
4. prepare and agree a scope of works with the customer which verifies the requirements
5. agree with the customer, the level of access and on-site support that will be provided during the assessment
6. confirm in writing with the customer, the instruction and the terms, conditions and arrangements that have been agreed

Gather data and information relating to energy consumption

1. prepare a pre-site inspection list
2. explain to customers the data and information that is required

- from them to enable analysis of energy consumption and agree when and how this is provided
3. gather data and information from customers that is specific to them and their organisation
 4. identify the relevant regulatory requirements and financial support that are relevant to the customer and their organisation
 5. review the data and information relating to the customer and the commercial energy advice and ensure that this is maintained in accordance with the relevant organisational requirements and data protection legislation

Knowledge and understanding

You need to know and understand:

1. the purpose and role of commercial energy advisers and the relevant information, advice and support that can be provided by them
2. how to confirm the requirements of prospective customers
3. the limitations and constraints that apply to the provision of information, advice and on-going support
4. how to confirm in writing the terms, conditions and arrangements agreed between yourself and the customer
5. the relevant fee structures and payment arrangements for the provision of information, advice and on-going support, if required
6. the range of information that is required from customers to for an analysis of energy consumption and the ways in which this can be provided
7. the activities, products, services, systems and processes of the customer and their organisation and their impact on energy and carbon consumption
8. potential sources of external data and information that is specific to customers and their organisation and how to obtain that information
9. how your organisation must comply with the relevant data protection legislation
10. sources of information about the relevant regulatory requirements and financial support available

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