

Overview

This standard is about those activities that are undertaken prior to a site visit and in preparation for the provision of home energy audit reports to existing and new customers.

It covers the marketing and promotion of energy advice services; responding to enquiries from existing and new customers, clarifying their requirements, and explaining the terms and conditions under which you can provide information, advice and on-going support. Note that the recommendations provided to customers 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 customers 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.

The standard is also about gathering property-specific data and information from the client and from other sources, such as Local Authorities, 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.

You must understand and work to the requirements of each devolved nation.

Prepare for the provision of energy advice services

Performance criteria

You must be able to:

**Market and promote energy advice services **

1. identify the energy advice services that may be of interest to existing and new customers
2. identify the potential market for energy advice services and ways of engaging with that market
3. identify the key messages to be conveyed to existing and new customers relating to the provision of energy advice services and the benefits to meet their requirements
4. provide information relating to energy advice services to existing and new customers
5. identify opportunities to promote energy advice services
6. respond to enquiries from existing and new customers and verify the limitations and constraints of the energy advice services offered
7. record customer contact information in accordance with the relevant organisational requirements and data protection legislation
8. confirm the interest of existing and new customers in energy advice services, and agree relevant follow-up actions with them

Agree terms and conditions for the provision of energy advice

1. respond to enquiries from existing and new customers within the agreed timescales
2. verify the requirements of the client for energy advice services
3. explain to existing and new customers the terms and conditions under which

information, advice and on-going support will be provided and the relevant fee structures and payment arrangements

4. explain to existing and new customers the limitations and constraints of the information, advice and on-going support
5. confirm in writing with the customer, the instructions and the terms, conditions and arrangements that have been agreed
6. identify those circumstances that would prevent you from providing information, advice and ongoing support and explain the reasons to customers
7. inform the client about 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

1. explain to customers the data and information that is required from them to enable analysis of energy consumption, and agree how and when this is provided
2. gather data and information from customers that is specific to them and their property

Prepare for the provision of energy advice services

3. gather data and information from relevant sources that is specific to the client and their property
4. prepare and review data and information and check that it meets the required standards
5. take the required action where data and information is inconsistent and/or incomplete
6. review the data and information relating to the client and the energy advice and ensure that this is maintained in accordance with the relevant organisational requirements and data protection legislation

Prepare for the provision of energy advice services

Knowledge and understanding

You need to know and understand:

**Market and promote energy advice services **

1. the range of energy advice services that may be interest to existing and new customers, and your ability to provide them
2. the different ways in which energy advice services and subsequent improvements can be supported and funded
3. the potential market for the energy advice services offered by you, and the range of ways in which that market can be engaged
4. the key messages to be conveyed to existing and new customers, and how to highlight the potential value and benefits of energy advice services
5. 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
6. how to identify opportunities to promote energy advice services
7. how to respond to enquiries from existing and new customers, and the importance of verifying the limitations and constraints of the energy advice services that you offer
8. how to record customer contact information, and the importance of doing so in accordance with organisational requirements and the relevant data protection legislation
9. how to confirm the interest of existing and new customers in energy advice services, and the importance of agreeing follow-up actions with them

Agree terms and conditions for the provision of energy advice

1. the purpose and role of energy advisers, and the information, advice and support that can be provided by them
2. how to verify and confirm the requirements of existing and new customers
3. the limitations and constraints that apply to the provision of information, advice and ongoing support
4. the importance of confirming in writing the terms, conditions and arrangements agreed between you and the customer
5. the relevant fee structures and payment arrangements for the provision of information, advice and ongoing support
6. how to identify and explain those circumstances that would prevent you from providing information, advice and on-going support
7. the importance of disclosing referral fees or other benefits you may receive as a result of the customer following your suggestions for particular goods, services and/or suppliers

Gather data and information relating to energy consumption

1. the range of information that is required from customers to analyse

Prepare for the provision of energy advice services

- energy consumption and the ways in which this information can be provided
2. the range of data and information required to enable a thorough analysis of energy consumption
3. potential sources of data and information that are specific to customers and their property
4. how to extract relevant data and information from customers and relevant sources
5. action to take where data and information is inconsistent and/or incomplete
6. how to record customer information, and the importance of doing so in accordance with organisational requirements and the relevant data protection legislation

Scope/range

**Market and promote energy advice services **

Information:

- written/printed
- verbal
- electronic

Agree terms and conditions for the provision of energy advice* *

Respond:

- face to face
- in writing
- by telephone
- by email

Circumstances:

- diary pressures
- conflicts of interest

Gather data and information relating to energy consumption* *

Data and information relating to:

- lighting, heating and hot water
- insulation and glazing
- household appliances, electrical equipment and their controls
- occupants use of the home
- energy suppliers, tariffs and household bills
- Energy Performance Certificate (EPC) and underpinning data
- financial support available to implement measures to reduce consumption (e.g. grants)
- options for low and zero carbon technologies

Prepare for the provision of energy advice services

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