Flex Community™ Learning Strategy

Sections

Learning sought:
1. Learning sought to improve our **marketing.**
2. Learning sought to improve the **customer journey.**
3. Learning sought to improve the **user experience.**
4. Learning sought to improve the **supplier and installer experience.**
5. Learning sought on the **collective impact** of Flex Community™.

Methods for acquiring learning:
1. Acquiring learning from **householder** participants.
2. Acquiring learning from **supplier and installer** participants.
3. Acquiring learning from **project partners.**

Learning sought

1. Learning sought to improve our marketing

What is our offer to potential participants?
- What will it provide for participants?
- What benefits will they receive?
- How will they access and make use of it?
- What is our Unique Selling Point?

What minimum requirements do people need to access the Flex Community™? For example:
- Smart Technology
- Possession of or desire to install energy Technology Technological skills & knowledge
- Financial circumstances
- Household energy supply
- Energy consumption patterns
- House tenure
- House type
- Geography

What is the profile of people who are missing?

How can we make it accessible for the people who are missing?

Which motivations should we target in our marketing? For example:
- Environmental

- Financial (e.g. save cost, earn income)
- Comfort
- Interest in Technology
- Support for Community ownership
- Activism (e.g. Pioneer / pathfinder)

What is the optimum balance between them?

What should our key marketing messages be? For example:
- Context (e.g. energy transition) and aims
- Technology
- Services provided
- Individual benefits
- Collective benefits
- Incentives
- Promotions

What is the optimum balance between them?

Which marketing channels, materials and engagement methods are most effective?

What barriers do we face around marketing and how can we overcome them? For example:
- Knowledge barriers
- Attitude barriers (e.g. to technology)
- Communication barriers (e.g. complexity

2. Learning sought to improve the customer Journey

How effective is the customer journey in enabling householders to:
- Engage with Flex Community™
- Join Flex Community™
- Select purchasing options for energy assets
- Install energy assets
- Set up flexibility
- Provide customer feedback
- Leave Flex Community™ if they choose to

What is the optimum balance between <u>automation</u> and <u>human interaction</u> at each stage of the customer journey?

What are the main problems and how can the customer journey be improved to solve them?

3. Learning sought to improve the user experience

What is the user experience of the portal?
- Is it clear what the purposes of the portal are for the user?

- Does it fulfil these purposes for the user?
- What value does it provide regarding:
  - Electrification of home energy assets?
  - Home energy efficiency?
- What financial benefits does it provide for users?
- What else could the Portal provide to help users and fulfil the aims of Flex Community™?

What is the user experience of the smart Technology?
- Functionality (what can it do / what should it do for the user?)
- Clarity (is it clear to the user what it can do?)
- Intuitiveness (how easy is it for the user to make it do what it can do?)
- Control (how much control does it enable the user to have?)
- Efficiency (how well and how fast can do what it can do?)
- Balance (how do each of the different functions interact with each other?)
- Dependency (how far is functionality and efficiency dependent on user phone hardware and software?)
- Gamification (what comparisons, incentives etc are useful?)
- Problem solving (is it clear when something is wrong and are their clear directions on how problems can be solved?)

What are the key outcomes (positive and negative) for the user?
- Comfort
- Finances (costs and income)
- Energy efficiency

What is the balance between the key outcomes (individual and collective)?
- Between comfort and finances (cost and income)
- Between comfort and energy efficiency
- Between comfort and flexibility
- Between cost and energy efficiency
- Between energy efficiency and flexibility

What conflicts need to be resolved and how can they be resolved?

4. Learning sought to improve the supplier and installer experience

What value does the portal provide for suppliers & installers?
- Marketing value – reaching potential customers, building trust and reputation.
- Logistical value e.g. co-ordinating installations, time management.
- Financial value e.g. efficiency and cost savings.
- Mission value e.g. meeting environmental goals.

What is our Unique Selling Point?

What is the supplier & installer experience of the portal?
- What works well (relating to potential value – see above)?

- What needs to be improved (relating to potential value – see above?

How do we select and retain good quality products and installers?
- Marketing messages
- Marketing channels

5. Learning sought on the collective impact of Flex Community™

How effective is Flex Community™ in facilitating electrification of heating and transport?
- Value for customers
- Value for suppliers and installers
- Income generation potential

How effective is Flex Community™ in facilitating energy efficiency?
- Value for customers (see User Experience)
- Impact on peak demand.
- Impact on overall demand.
- Income generation potential

How effective is Flex in facilitating flexibility / demand side response?
- Value for WPD / the National Grid.
- Effectiveness of how the technology operates in the market (e.g. accessing information and responding to signals)
- Effectiveness of technology in predicting (e.g. customer behaviour, weather patterns).
- Factors that facilitate / act as a barrier to customer flexibility.
- Income generation potential (for customers and community aggregators).

What is the balance between energy efficiency and flexibility?
- Conflicts that need to be resolved.
- Methods for resolving these conflicts.

How effective is Flex in facilitating peer to peer trading at the community level?
- Effectiveness of technology in supporting peer-to-peer trading.
- Factors that facilitate / act as a barrier to householders/communities engaging in peer-to-peer trading.
- Value for householder/communities.
- Income generation potential (for householders and community generators)

How effective is Flex in facilitating the installation of community owned renewable energy?
- Value for community generators.
- Value for grid operators.

What is the viability of BWCE operating as a community aggregator following the Next Generation project?
- Strengths
- Weaknesses
- Opportunities

- Threats

Methods for acquiring learning:

1. Acquiring learning from householder participants.

Participant Surveys
All surveys will be conducted in accordance with the BWCE Privacy Policy.

Baseline Energy Awareness & Attitudes survey

Why?	To get a sense of the audience we are reaching (e.g. for ongoing / future marketing purposes). To get baseline information on attitudes/behaviours etc so we can subsequently assess any changes due to the project.
How?	Via Survey Monkey co-ordinated by BWCE as part of the pre-Portal stage. Not on the Portal.
When?	Triggered when they complete an Expression of Interest
What happens to the results?	Shared with the Sounding Board to aid their review of the project. Informs future marketing plans. Stored to be used as a baseline for future satisfaction/impact surveys.
Current development status	Designed and in use

Portal review survey

Why?	To assess the functionality of the Portal based on key factors (e.g. ease of use).
How?	On the Portal
When?	Triggered when their installation date has been set up

What happens to the results?	Fed into ongoing development of the Portal
Current development status	Survey to be designed and added to the Portal.

To be based on the feedback template which accompanies the email providing participants with access to the Portal. |

Post-installation feedback survey

| Why? | To assess the installation process based on key factors.
• Householder satisfaction with the Portal as a means of choosing installers/products and arranging the installation.
• Householder satisfaction with the installation of new energy technology.
• Householder satisfaction with the installation of Stemy smart technology to offer flexibility. |
|---|---|
| How? | On the Portal |
| When? | Triggered by sign-off of the installation by installer and householder |
| What happens to the results? | Fed into ongoing review of the installation process |
| Current development status | Survey to be designed and added to the Portal.

One survey for all energy technology options based on the current hot water installation survey. |

Flexibility feedback survey

Why?	To assess the experience of providing flexibility
How?	Via Survey Monkey co-ordinated by BWCE.

Ultimately, for ReDream, to be added to the Portal. |
| When? | HW control group to be surveyed in April prior to 1st Sounding Board meeting.

New participants to be surveyed prior to final Sounding Board meeting (see below). |
| What happens to the results? | Fed into ongoing development of the project |

Current development status	To be designed and added to the Portal

End of project Energy Awareness & Attitudes survey

Why?	Assess if there has been any change amongst participants (e.g. behaviour) as a result of Flex Community™.
How?	On Survey Monkey co-ordinated by BWCE. Not on the Portal.
When?	September 2021
What happens to the results?	Fed into Next Generation project reporting. Informs marketing plans for ReDream.
Current development status	Needs to be developed from the baseline survey.

Participant survey of experience, feedback and recommendations

Why?	Assess general satisfaction with Flex Community™
How?	On Survey Monkey co-ordinated by BWCE. Not on the Portal.
When?	September 2021
What happens to the results?	Fed into Next Generation project reporting. Informs marketing plans for ReDream.
Current development status	To be designed

Project Sounding Board

The Sounding Board will be a specific group of participants we recruit to work with us to review the project during the lifetime of the Next Generation funding. This will be set up following the launch of the Flex Community™ Portal.

Group specification

The group needs to represent a diversity of project participants based on key criteria:

Knowledge of energy (and energy transition) issues	A mix of those who are well versed in climate/energy issues and those who know less
Behaviour regarding energy reduction and time shifting	A mix of those who have taken steps to become more energy efficient and those who are just starting out.
Use of, and attitudes to, smart technology and online platforms.	A mix of high & low digital awareness and activity
Ability/willingness to be flexible in terms of finances and comfort.	A mix of those able/willing to sacrifice personal need for climate requirements and those who struggle to do this
Progress within Flex Community™	A mix of those who complete installation & provide flexibility and those who (for whatever reason) do not progress.

The baseline Energy Awareness & Attitudes survey will provide useful information to inform the selection of members.

Role
1. To support staff to review the design and delivery of key elements of the Next Generation project e.g.
    a. Promotion and engagement
    b. The Flex Community™ Portal
    c. The installation process
    d. The process of offering flexibility
    e. Interaction with BWCE/Stemy
    f. Pros & cons for householders
2. To analyse and comment on collective feedback gained from the various participant surveys.
3. To make suggestions for improvements and development

Meetings
1. Likely to be via Zoom (face-to-face options to be explored when appropriate)
2. Duration – likely to be 1 hour
3. Starting from April 2021 with further meetings in June and September 2021

Recruitment
- Analysis of baseline survey to inform selection
- Information (e.g. role, commitment required) to be circulated to all participants to invite interest
- A selection procedure will be required a further promotion to 'nudge' those we would particularly like to be in involved to sign up
- Aim to recruit members by end March 2021

2. Acquiring learning from supplier and installer participants.

Feedback from suppliers and installers

End of project partner interviews

3. Acquiring learning from project partners

Data collection via Stemy smart technology

Reflections on experience by BWCE and Stemy Energy staff via meetings

Feedback from WPD and the National Grid

Financial modelling

End of project partner interviews