



GREEN DEAL COMMUNITIES

YOUR CHECKLIST:

(Taken from the 10 factors opposite)

- Project offer has been tested and is being interpreted correctly by customers.
- A clear mechanism is in place to get feedback from those that have taken up scheme and those that have not.
- The engagement/ assessment/ plan sign up process has been tested on warm leads.
- The householders targeted are able to contribute a minimum of the 'Golden Rule' amount towards the cost.
- The streets being targeted have an archetype that is cost effective to install measures on.
- Local community groups are being used where needed/ possible.
- Initial enquiries are responded to within 48 hours.
- The customer journey steps are formed from the customers' perspective.
- Project Manager is aware of stakeholders' activity and issues that slow down the process are being resolved quickly.
- Show homes are up and running and are actively promoting the project.
- Provider options are sent in one response to customers.
- A quality assurance system is in place for measures installed.
- Installation costs have been researched and benchmarked.
- GD Provider offers an online portal for tracking offer.
- GDAR and quote process is delivered online.
- GDC project is linked to one or more local initiatives or schemes.

10 Factors for Success



The most important factor in converting an expression of interest into an active customer is...

A positive customer experience!

This factsheet has been based on what we have learned from Local Authority projects so far.

Most customers will want to know as many facts as possible up front and for the process to be as simple and take up as little time as possible.

It is crucial to gain early experience and use on-going customer feedback to ensure your delivery process works smoothly.

1. **Test your offer.** Householders may not interpret your offer how you expect so make sure you have a clear mechanism to obtain direct feedback from customers (and from those who aren't interested). Discuss adjusting your offer with your DECC Account Manager if you think you need to. More time spent refining the offer in the early stages is likely to reap benefits later!
2. **Test the process by using 'warm leads'.** These householders are likely to be more resilient to early hiccups in the process and will allow you to test it quickly. **Haringey** is testing its offer with 200 'warm leads' and is obtaining good take-up. Warm leads might come from previous projects or other schemes where customers have shown interest.
3. **Actively use show homes in the target streets.** Getting your show homes up and running at the start is really important. **Leeds** is installing their first three show homes and is filming a video diary with residents to showcase the work online.
4. **Target the right homes.** Match the right offer (costs and measures), with the right area (archetype and residents) in order to ensure high take up, particularly as residents need to be able to contribute. Keep this under review as market conditions may change. Use local community groups to gain further insight. **Bristol** is working closely with local community organisations.
5. **Respond quickly.** No one likes waiting so increase take up by responding to a customer's initial enquiry quickly – within 48 hours ideally. If this isn't possible, give the householder a date that you will respond by and provide a phone number for people to contact you on.
6. **Provide a single response.** Customers are much more likely to take up an offer if they have a range of proposals to choose from as part of a managed package. Where multiple providers are being used, combine all the offers into one batch in a single response to the customer. This makes it easier for the customer to choose between offers, and inspires confidence in the validity and professionalism of the scheme.
7. **Shorten and perfect the customer journey.** A delay or error in the customer's journey could cause them to lose confidence in the scheme and drop out. Every step of the journey needs to be quick, professional, considerate and encouraging. Plan each step in the process from the customer's point of view and seek to improve it on a continuous basis. It is very important that all stakeholders are coordinated properly – bottlenecks that slow the process down need to be identified and solved quickly. For example, **Cambridge & Suffolk** working with Climate Energy has improved its customer journey by carrying out the GDAR and the technical survey in one visit.
8. **Manage quality and costs.** Establish a process for assessing costs of installation work as quotes come in and ensuring that costs are clear for the customer, e.g. what are the basic costs of SWI and what are the costs of other finishes etc. Talk to DECC/ other LAs to benchmark costs. Learning from previous work **Nottingham** has a fixed price offer for SWI based on the property's archetype. Establishing a process to review installation quality is crucial so seek customer feedback after installation - a poor quality installation will have a negative impact on the project and the customer.
9. **Go online.** Offer an on-line portal to enable you and the customer to track the delivery process easily. This provides confidence in the process for customers and helps you to monitor GD plans take- You can also automate the GDAR and quote process through your own website to keep costs down and make life easier for customers. **Manchester** is currently automating their GDAR booking system through their website
10. **Utilise other local initiatives.** Promote your offer at local events and hold town hall Q&A meetings and seminars to further spread the word to local residents and small businesses. Piggy-back on other local schemes to promote GDC too. For example, **Telford** is working with its 'Pride in the Community' initiative to promote its Green Deal Communities offer and get added value from bringing together two funding sources.