Flex Community Learning Strategy

Sections

1. Marketing
2. Customer journey
3. User experience
4. Collective impact

Methods for acquiring learning

1. Marketing

Learning required	Details
What is our offer to potential participants? What is our Unique Selling Point?	• What will it provide for participants? • What benefits will they receive? • How will they access and make use of it?
What minimum requirements do people need to access the Flex Community? What is the profile of people who are missing? How can we make it accessible for the people who are missing?	<u>For example:</u> • 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
Which motivations should we target in our marketing? What is the optimum balance between them?	<u>For example:</u> • Environmental • Financial (e.g. save cost, earn income) • Comfort • Interest in Technology • Support for Community ownership • Activism (e.g. Pioneer / pathfinder)
What should our key marketing messages be? What is the optimum balance between them?	<u>For example:</u> • Context (e.g. energy transition) and aims • Technology • Services provided • Individual benefits • Collective benefits • Incentives • Promotions
What 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. Customer Journey

Please refer to the latest version of the customer journey.

How effective is the customer journey in enabling householders to:	What is the optimum balance between automation and human interaction at each stage of the customer journey?	What are the main problems and how can the customer journey be improved to solve them?
1. Engage with Flex Community		
2. Join Flex Community		
3. Select purchasing options for energy assets		
4. Install energy assets		
5. Set up flexibility		
6. Provide customer feedback		
7. Leave the Project if they choose to		

3. User experience

Learning required	**Details**

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

4. Supplier & installer experience

Learning required	**Details**
What value does the portal provide for suppliers & installers? What is our Unique Selling Point?	• Marketing value – reaching potential customers • Logistical value e.g. co-ordinating installations • Financial value • Mission value e.g. meeting environmental goals
What is the supplier & installer experience of the portal?	• What works well? • What needs to be improved?
How do we recruit new suppliers & installers?	• Marketing messages • Marketing channels

Comments to add:

Alison
Perhaps need to capture the 'control' aspect i.e. decisions about how the installer's time is managed, under 'Learning Required': what are the downsides of using the Portal for supplier and installers? Or, are you assuming the 'downsides' will be captured in the experience?

Alex

Under details for section 1, cost savings/efficiency will be a possible outcome, helping them reduce prices to customers

Under section 3, bear in mind our partner at the moment feel special and we want them to be helpful and not get put off by potential competition at this stage in my opinion, would we be better to word this as how do we ensure we select and retain good quality products and installers – this is less threatening and a bit flattering – sounds silly but will help

An extra section might be related to the role of the platform in educating and advising customers and how could it benefit the customer journey to support them (i.e. providing financial budgets, advice on which routes)

Alvaro
Aligned on what you say, I would suggest:
1) It is a quality "certification". Installers will be rated, as in Amazon or in other web sites.
2) It will easy procedures with the government (when we integrate with on route).
3) Reduce their cost as well.

5. Collective impact

Learning required	Details
How effective is Flex in facilitating electrification of heating and transport?	• Value for customers • Value for suppliers and installers • Income generation potential
How effective is Flex 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. Feedback from participants via surveys, meetings and review group.
2. Data collection via Stemy smart technology
3. Reflections on experience by BWCE and Stemy Energy staff via meetings
4. Feedback from suppliers and installers
5. Feedback from WPD and the National Grid
6. Financial modelling