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# Analysis Report for Business Optimisation Plan

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## Executive Summary

The Superhomes Customer Journey and Business Optimisation Planning Journey has completed its first iteration. But this is just the beginning with a commitment by the leadership team to continue with a customer-centric service and frequent challenge and build workshops. This will be on-going with a clear focus on innovation and quality across all service provision steps and across all departments.

This process facilitated design thinking methods and identification of opportunities for Superhomes to innovate. The customer journey stages were clearly defined and grew from 6 steps to 10 steps. Clearer communications with customers through processes, staff training, and website communications have been initiated. Newly transformed journey can be seen from the first interaction with the newly designed application form all the way through to a detailed homeowner manual when the retrofit is complete.

Many factors are critical to starting and continuing a customer journey and business optimisation planning and ensuring success.

This will require:

- **Organisational factors**
- **Focus on Innovation**
- **Delivery**

Ultimately a team commitment to customers and to quality service provision will drive the growth, process development and delivery of the newly refined Superhomes Customer Journey.

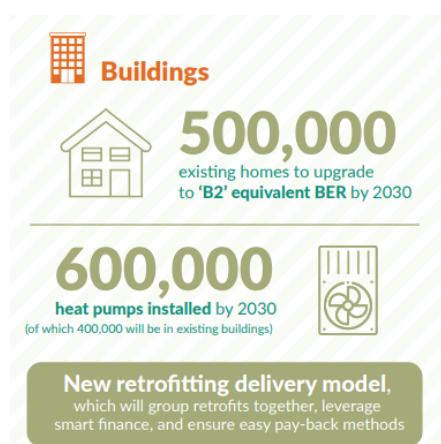
# Introduction

## Background and Context

Ireland's Climate Action Plan sets very ambitious targets for the renovation of buildings and transition from a fossil fuel-based energy supply to low carbon energy supply (see table below). Progress against these targets has been very slow through a combination of Covid interruptions, low customer engagement and the lack of national OSSs operating at scale. Ireland (similar to other EU Countries) aims to focus on a green recovery post COVID.

Superhomes plan to provide a national retrofit One-Stop-Shop model aligned to Ireland's Climate Action Plan, which aims to grow customer engagement and awareness, group retrofits together for efficiency, and leverage smart finance options to those that need them.

Figure 1: Climate Action Plan Infographic



Climate Action Plan 2019: gov.ie - Climate Action Plan 2019 (<https://www.gov.ie/en/publication/0015c-irelands-national-energy-climate-plan-2021-2030/>) define actions and measures across all sectors of society.

## Business Overview

Superhomes provides a domestic energy efficiency retrofitting building services, with project design and supervision. There is an ambition to lead the way in the energy transition from fossil fuels in homes, working towards to low-carbon emissions in Ireland by providing deep retrofits of existing domestic buildings using a One-Stop-Shop model.

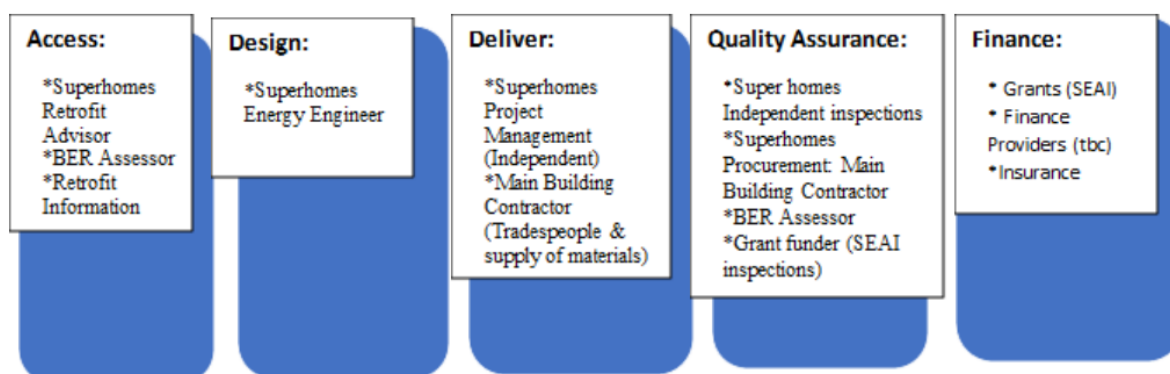
This model offers an end-to-end service including grants, technical advice, contractor procurement, and planned access to low-cost finance partners (banks/credit unions). Superhomes offers a "whole house" solution including central heating, air tightness and ventilation as well as insulation. Superhomes believes that a One-Stop-Shop model based on market actors with appropriate checks and balances and supports to be the most efficient method of meeting the ambitious CAP targets.

There is a focus is on technical solutions and design specifications, project supervision, through a tendering process to preapproved and developed contractors, and facilitating grant application and claims for homeowners. The Superhomes team, work with clients (homeowners) throughout their journey from inception to project completion, and to grant subsidy drawdown.

From a client perspective, the integrated solution becomes a one-stop-shop (OSS) service in the retrofit sector, when clients who would like to realise energy renovation of their homes are aided in more than

one/few steps in the process. The Superhomes OSS service will transform a cumbersome and complex set of decision-making/actions by non-experts into a single entry, customer-friendly offer from a trusted independent advisor.

Figure 2 Superhomes OSS Offering:



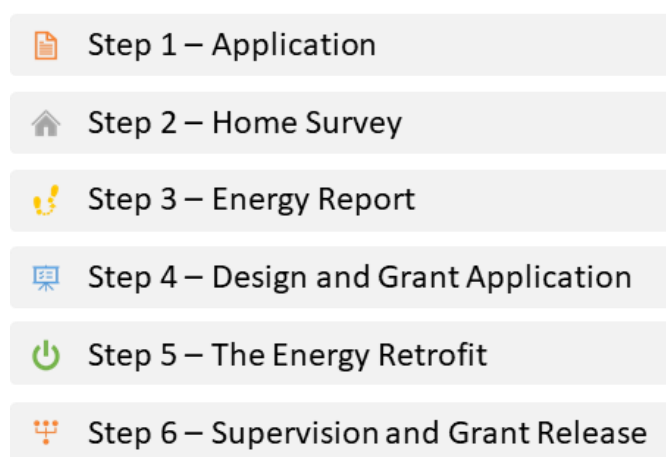
The operations model links advisors and engineering endeavours. Each individual project starts with a homeowner application and then an initial phone consultation/suitability assessment by the sales team. The property can then be surveyed by a Superhomes engineer and from there the design of the technical solution and procurement activities take place. Once agreed and grant funding is identified for the project, the project works commence with Superhomes representing the customer providing supervision and quality assurance inspections. Superhomes team project supervise and manage client/contractor billings and facilitate grant application and drawdowns.

## Report Outline

The objective of the review is to improve the current procedure and obtain an efficient, task-oriented and user-friendly system to manage the Superhomes2030 internal process.

The review of the internal business process management will consider business streamlining including respectively phone contact, survey, tendering, reporting, design, finance, contractor, start of work, end of work, Q&A, payment. It will analyse each step of the Superhomes Customer Journey, capturing unarticulated needs and 'pain points'. It was noted that the customer journey in energy renovation OSS is slightly different to traditional marketing with reference to a decision to purchase path as it encompasses both 'purchase' and 'production' qualities.

Figure 3: Superhomes Customer Journey:



This report demonstrates analysis of each step. There will be clear allocation of responsibility, specific defined deliverables and information filing instructions. The objective of the review is to improve the current procedures, and obtain an efficient, task-orientated and user-friendly system to manage the Superhomes2030 internal processes and inform the Superhomes Customer Journey Optimisation Report (D5.2).

Process reviews can be long and complex, and therefore there is a need to define a core team & wider cohort that will participate in each stage of the journey. The team needs to include a range of managers and employees to ensure consideration of every relevant department. This multidiscipline team will address every element of the business. The core team at Superhomes consisted of decision-makers and representatives from across the organisation, including sales & advise, engineering, finance, human resources and marketing.

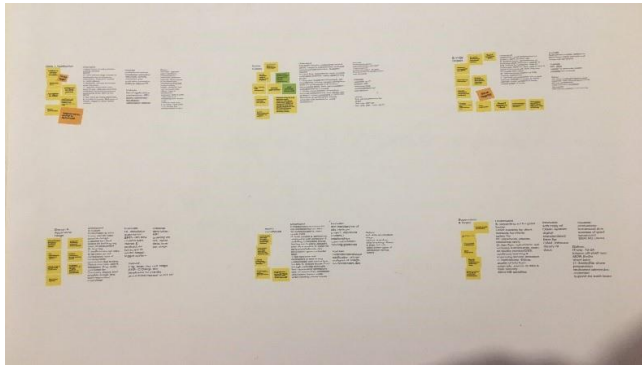
Initially, discussions took place with the team to define what can be achieved in the customer journey and business optimisation process to meet the needs of the Superhomes2030 and the business, while remaining within the time and resources available. It was agreed that a series of online meetings and in-person workshops would be held to review each step within the context of Understand, Innovate, Validate and Deliver.

- **Understand** consideration would consist of SWOT (Strength, Weakness, Opportunity, Threat) analysis, the vision for the step and current situation
- **Innovation** covered the value proposition (wants, desires, pressing issues, etc), 'jobs to be done', 'pains' and 'gains'
- **Validate** sought verification of learning, cost- benefit of the elements of the step
- **Deliver** laid out activities that are required, identified responsibilities and deadlines.

## Analysis for Business Optimisation Plan

Through the series of workshops where each customer journey stage was analysed, challenged and built upon.

Figure 4: Workshops



Clear service offering strengths were discovered showing technical expertise and commitment, opportunities to raise awareness and empower homeowners were also discovered. Communications and resource issues were highlighted, and competitive and state policies were also considered in-depth.

Through this discovery further investment in IT and HR are now seen to be keys to unlock innovation and propel this service offering. New management action plans with clear tasks and responsibilities have been created. These will be produced and will incorporate the key performance indicators identified through these customer journey and business process workshops.

The Superhomes One-Stop-Shop model and associated processes were defined and refined, with clear roles for each team component.

Figure 5: Superhomes Homeowner Team

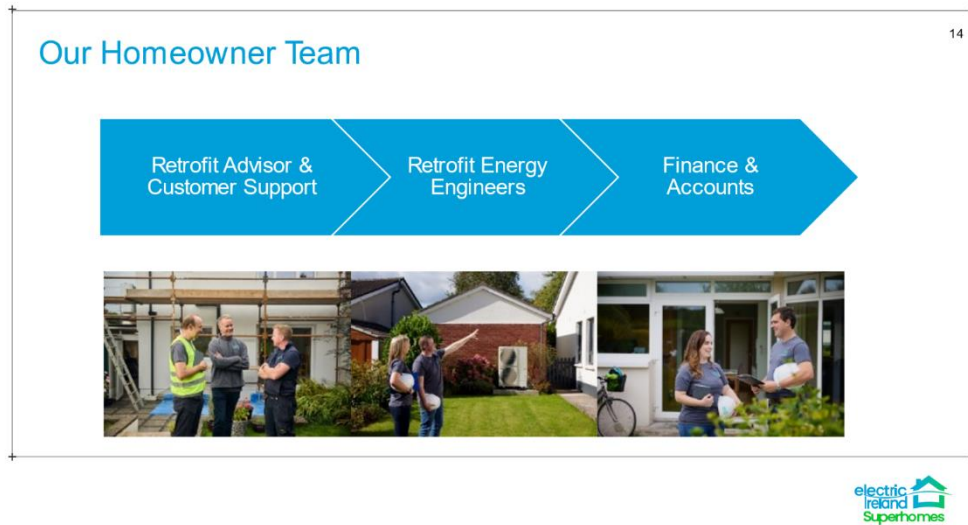
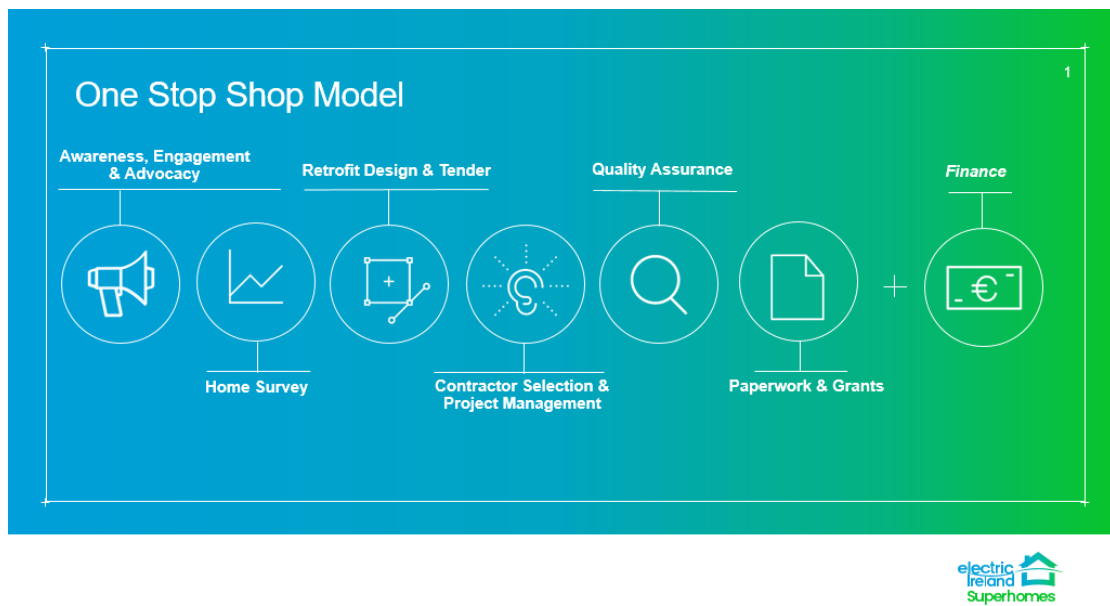


Figure 6: Refined Superhomes One Stop Shop Model





## Outcome

Through this discovery process the customer journey was refined and defined. It was fine-tuned with clearer and more concise communication to customers. The initial application stage was transformed with a more user-friendly application form and the Electric Ireland Superhomes website now has a dedicated page to demonstrate the Superhomes Customer Journey. This will inform staff training plans and how tasks are approached for each retrofit project.

### [Process - Electric Ireland Superhomes](#)

The aim of Electric Ireland Superhomes is to provide the best support possible to design and complete your whole house retrofit. Our team of Advisors, Retrofit Engineers and leading retrofit contractors are part of our 'One Stop Shop' approach to guide you through the entire process to deliver a warm, comfortable, and healthy low-carbon home.

We look after all the key stages of your home retrofit, from initial design the whole way through to the payment of SEAI grant funding. We engage leading contractors and experienced retrofit specialists to deliver the best quality retrofit in Ireland and, at the end of the process, the best home possible.

*Figure 7: The refined Superhomes Customer Journey and Process:*



**Step 1** We schedule an initial consultation with our Retrofit Advisor, after which you'll have a clearer idea about what measures, costs, grants and timelines are involved in your project.



**Step 2** The Home Survey stage helps us to put together a much more detailed profile of your home and to design your retrofit. At this stage, the Electric Ireland Superhomes Engineer will need access to your home for about 2-3 hours. While you do not have to be there, the survey is a good opportunity to meet our Retrofit Engineer and give your first-hand account of the house.



**Step 3** Your retrofit engineer will start work on designing a solution to meet Electric Ireland Superhomes standards.



**Step 4** We will issue the works to tender to one of our Approved Contractors OR apply a market rate estimate of costs, whichever is applicable.



**Step 5** Your Energy Report is emailed to you, and we arrange an Online Consultation to go through the report in detail. If you are satisfied with the recommendations in the Energy Report, we draw up a contract for the retrofit and agree a start date with you.



**Step 6** Your Electric Ireland Superhomes retrofit begins.



**Step 7** Your Electric Ireland Superhomes engineer carries out a check on works in progress.



**Step 8** Electric Ireland Superhomes carries out a final inspection on the completed retrofit. There may also be an inspection by SEAI which will also be attended by your Electric Ireland Superhomes Engineer. A final BER is carried out by an Independent Assessor confirming your new BER rating.



**Step 9** Once all snags are complete, your Electric Ireland Superhomes Engineer will organise a one-to-one tutorial to demonstrate how the system works. You will also receive the detailed Homeowner Manual, explaining everything you need to know about running and maintaining your new energy system.



**Step 10** Electric Ireland Superhomes draws down grant funding from SEAI on your behalf.

## Conclusions and Recommendations

The facilitation of the process came to an end, but the customer journey and business optimisation planning journey of Superhomes is just beginning and will be on-going with a clear focus on innovation and quality across all service provision steps and across all departments. This process facilitated design thinking methods and identification of opportunities for Superhomes to innovate.

Throughout the review business opportunities were identified and explored, seeking to develop action plans that can take these ideas into practical activities to optimise the process at each stage, thus reducing staff and overhead costs and inputs along with enhancing customer journeys and contractor development.

Many factors are critical to starting and continuing a customer journey and business optimisation planning and ensuring success. This will require:

### **Organisational factors:**

- Developing and aligning a common vision
- Senior management support
- Sustained commitment and investment to a business wide effort

### **Focus on Innovation:**

- Exploration and development of digital and IT infrastructure
- Investment in systems
- Continuous consideration of possible collaborations and partnership opportunities
- Commitment to solution focused workshops seeking to develop and implement action plans

### **Delivery**

- Clear lines of responsibility and planning systems
- Commitment to organisational and recruitment strategies to support innovation and delivery
- Dedication to expertise; skills enhancement of staff and contractor support

Superhomes has technical and delivery strengths, with opportunities to further development in communications, training and digital supports and capabilities. Brand development and knowledge hub creation in Work Package 2, and training, standards refinements in Work Package 3, will further strengthen this project. Also, innovation in light of possible finance provider partnerships (Work Package 4), and smart technologies will further enhance the Superhomes Customer Journey. Contractor capacity building and contractor relationships will require the development of a robust and agile pricing system with dedicated contractor development resources.

This analysis will inform the Superhomes Business Optimisation Plan and future endeavours including clear process mapping and the development and implementation of in-house action plans.