Superhomes Customer Journey Opimisation Report

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Executive Summary

The Superhomes Customer Journey and Business Optimisation is continuously evolving. Commitment and support by the leadership team is to continue with a customer-centric service and frequent challenge and build workshops. This will to be on-going with a clear focus on customer needs, and innovation and quality across all service provision steps and across all departments.

During this project the process facilitated design thinking methods and identification of opportunities for Superhomes to innovate. The customer journey stages were cleared defined and systems designed to delivery standardisation, automation and transparency. A complete Superhomes Enterprise Resource Planning (ERP) system discovery and scope is complete. The vision statement for this was to "Design and build an integrated connected system that empowers users to track and support our customer retrofit journey through efficient processes enabling superior performance and growth".

All customer journey steps for Superhomes retrofit projects are clearly defined and support will be from the Superhomes ERP System and a dedicated organisation with clearly defined and 'lived' core purpose and values. Additionally, systems and applications for standardising the customer journey and engineering activities, providing procurement solutions and standardising contracts, will be integrated. These will allow continuous feedback and updates to customers, and provide for a more streamlined and collaborative service offering.

The Superhomes ERP System

It was recognised early that continuing to use basic software tools and disparate systems would impact the ability of Superhomes to scale and continue to meet customer's needs. An Enterprise Resource Planning (ERP) system would be required to allow the organisation to manage and monitor the customer journey across all functions.

An ERP system improves collaboration by making information available across functions, lowering operational costs by streamlining processes and automating tasks, providing better business insight using real-time dashboards and reporting, and reducing risk by improving data integrity.

The system that was identified as a good potential match for Superhomes requirements. It is a cloud-based solution that could sustain Superhomes One-Stop-Shop when operating at scale, and be easily accessible by staff and external partners nationwide. The chosen ERP System is capable of tightly integrating with the existing Customer Resource Management (CRM) system, and document and storage systems, and has the flexibility to connect to external systems where required.

Expert partners were engaged to work with Superhomes to map our current processes, match the business processes to the most suitable technology, and identify top initiatives. Workshops were scheduled with frontline staff and management across all functions, and with a number of external stakeholders.

The vision statement for the workshops was to "Design and build an integrated connected system that empowers users to track and support our customer retrofit journey through efficient processes enabling superior performance and growth".

The top initiatives identified were:
- Better communication of process and progress to clients
- Better collaboration with contractors
- Better re-use of data within and between departments
- Reduced reliance on engineers for non-technical workloads

An enterprise architecture report was prepared and showed that to provide the best approach for each part of the customer journey we would need multiple integrated systems.

System	Description
CRM	Handles Contact and Account creation. The Marketing and Sales Teams will handle their primary operations through CRM modules.
Central System	In addition to core finance function, the Projects are mastered here, with an extended QR entity acting as a repository that captures and disseminates all data pertaining to a Project.
Contractor App	Contractors will use this to consume all necessary Project data. They will be able to update Project status for milestones etc., submit proofs of work and contribute to compliance documentation.

Engineers will also use this for survey data capture. It is possible that Engineering could take this app as a base with minor alterations as a separate app.

A snagging app may be integrated as part of the end design. This would cover Survey and Snagging. The Contractor App would then be required for project updates, tessellating with the application functionality |
| Document Management System | Due to the large volumes of ancillary data such as photos that will be captured through the system, these will be held in the document management and storage system. |

Solutions

Standardising the Customer Journey

Integrated System for Customer Journey/Project Delivery

The customer's journey and project delivery is at the heart of the Superhomes system development. The creation of what we has been coined a 'Retrofit Engine' will add more automation, standardisation and increased opportunity for decision making to the customer journey. This is the development of an online retrofit calculator via an updated customer application form. This step will provide customers with an opportunity to input high level data to the Retrofit Engine and in return be provided with an 'Initial Assessment' report that will include retrofit measures, an estimated quotation, expected results, and so forth. The Retrofit Engine will extract information from the customers' existing BER (Building Energy Rating) data and marry it with in-house programming and pricelists.

If customers choose to proceed to consultations with Retrofit Advisors and then to home survey by Energy Engineers, the same data can be viewed and updated as required, and be provided in an Energy Report for customers presenting more accuracy and detail, than the high level calculation quotation previously provided. This will decrease cycle time, provide transparency and increase delivery efficiency

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by adding more automation to the process, and it will facilitate the provision of key information in a timely fashion required by customers to allow them to make informed decisions.

Home survey data can be submitted by an Energy Engineer directly to the Retrofit Engine. The Energy Report would then be generated from that interface. The Retrofit Engine will be integrated with the Superhomes system so data will only need to be input once and stored centrally. This will be available to all relevant staff allowing for improved customer support and feedback.

Projects will form the spine of the system architecture and an integrated system build on it.

Benefits of this approach include:

- Improved data quality and consistency: Replacing spreadsheets with a centralised system will provide a single source of all lead and customer data, ensuring accurate and consistent tracking of interactions and activities. This will support the provision of information to customers on each step of their retrofit journey.
- Increased visibility: The integration will provide increased visibility into the lead lifecycle, enabling the marketing and sales teams to make data-driven decisions to improve existing processes.
- Enhanced collaboration: The integration will facilitate better collaboration between all teams such as marketing, sales, engineering and finance, improving overall teamwork, and internal and external communication.
- Increased efficiency: The centralised system will automate many of the manual tasks associated with delivery processes, freeing up time and providing more efficient standardisation of project delivery and service.
- Improved reporting and analytics: The integrated system will provide robust reporting and analytics capabilities, enabling the all teams to track and analyse their performance more efficiently.

Constant Feedback

Customers will receive automated emails based on the following scenarios, triggered by events:

- Consultation Booked
- Survey Booked
- Project Started
- Milestone Reached
- Expected Completion Dates updated
- Project Complete

To further elevate the customer experience, there is an option for personalised journeys, and increased brand awareness. This solution integrates seamlessly with current and developing systems fostering transparency and complete visibility throughout the customer journey.

The new system will be is used to capture and track sales leads and manage sales opportunities. Lead submissions trigger automatic creation of lead records. A Business Process Flow streamlines the conversion of qualified leads into opportunities and will be further enhanced with additional steps in lead qualification.
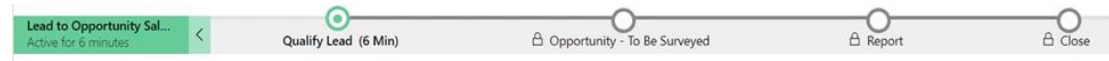
The existing Lead to Opportunity Business Process Flow.

The Superhomes system will automatically create Contacts for each individual they interact with, including customers and contractors. Prospective customers will be generated as Contacts automatically, while partners and vendors may be created manually. Contacts will be categorised to enhance segmentation and to provide a more organised and efficient way to manage relationships with Leads, customers, and other types of contacts.

Projects will be the focal point of the Superhomes operational system structure.

Projects (Job) in the system will be structured in a three-level hierarchy:

1. Job

    This is where basic information around the Job is held, such as the Customer name and address, posting group information and an overview of the numbers.

2. Job Task

    This middle level provides the ability to create phases or stages of a Job as "Tasks". There may be one or more Tasks on a Job. The Tasks will be equated to Job Milestones.

3. Job Planning Lines

    Job Planning Lines are the area where Items and Resources are explicitly noted, priced and enumerated. Purchasing and Sales Invoicing are driven from the Job Planning Lines. You may have one or more Job Planning Lines per Job Task. Job Planning Lines will be the basis for the creation and formation of the Quote Request (QR). QR data will be held here.

To support relationships with customers and the Superhomes customer centric value, Superhomes will be able to allocate the following resources against a Project:

- Project Manager
- Salesperson
- Sales Support

Engineering Standardisation

The focus on standardisation in engineering primarily involves survey and snagging endeavours on retrofit projects.

Home Surveying:

The previous system saw Superhomes capture data regarding the houses they plan to work on during their surveys using a combination of methods individually developed by engineers including their own methods of surveying properties, collecting the data, and creating drawings. This can range from pen and paper to applications like excel and AutoCAD. This can lead to inconsistencies in the data that is collected, create difficulties transferring projects between engineers, and require data entry to be duplicated as it is submitted into various IT systems. During the survey, the engineers created sketches, radiator schedules, window schedules, etc. to document the features of the house. Energy Engineers asked standard questions during the survey, such as the age of the house and how long the occupants have lived there, as well as whether there is evidence of any previous work completed (e.g. insulation, new windows). The engineers also measure the length and breadth of the rooms to create a floorplan.

The system to address this, uses tablet or mobile devices and a survey application. The application allows Energy Engineers to easily measure and sketch plans and share them with other team members using the this cloud application.

Reports can be created in PDF format detailing all aspects of the survey including pictures and notes. All data from the survey can be extracted and used for submission to other systems without additional data entry. The application standardises the survey process, provides more accuracy, and ensures that we maintain a consistent high standard for all of our customers

The data that Superhomes needs to capture includes information about the windows, radiators, doors, external doors, type of light fittings, open chimneys/flues/fender vents, heating system, wall construction, attic, and floor. This information is later used by the DEAP-4 software to generate a BER (Building Energy Rating).

Snagging and Quality Checks:

To ensure a high-quality product, Energy Engineers perform regular checks on the work completed on Retrofit Projects. If issues are detected, using the current system can be a very time-consuming process of phone calls and emails between the engineer and the contractor. It is difficult to track issues for both parties. The objective in this case is to create efficiency and streamlining.

To address this issue Superhomes is intends to use an application which runs on any tablet or mobile device, to standardise and automate the snagging process. Using any mobile device Energy Engineers can drop a pin on the floorplan, create CAD drawings for a project, take a picture, and give a description of the snag.

Once assigned to a contractor, a project report will be provided to the contractor, containing details of all their open snags. Using the same application, a contactor can report the snag as complete and easily provide photographic evidence for approval by our engineering team.

The automatiated notifications, reporting, and requirement to provide evidence ensures that all snags are resolved to ensure all our customers receive the same high quality outcome.

Project Updates and Milestones

Both applications will be integrated with the Superhomes system allowing a routine report to be created that will prompt Contractors to update their Projects with respect to expected completion dates for milestones and progress on-site. Through a contractor application a screen based table will enable Contractors to flag completed Milestones and Engineers will be able to indicate that they concur with the completion status. This will streamline payment and verification processes.

It is planned that all applications in use will be integrated into the overall Superhomes system to allow a clear and concise view of the customer journey and to track progress and achievements.

Procurement Solutions

New system developed for procurement and streamlining contractor communications.

Previously, the Engineering department used the survey data to create and track tenders for the work required. Based on the surveys, the Engineering team needed to create a Tender, find a contractor, and share a set of documents that include the survey, photos, design, and pre/post-works BER for every individual property to be retrofitted. Under this system contractors were given access to a SharePoint folder to access the tender documents. It was believed that this this was not an efficient process. The newly developing process will be mediated through an application for contractors (Contractor App). This is being created to support contractor and engineering department work flows and will use virtual entities to synchronise data. The main document for receiving the tender responses is the QR, which will automatically form part of the process to be tracked.

Reduce Lead Times

Superhomes aims to turn around tenders in a timely fashion, understanding that delays at this stage may negatively impact the customers journey and the initial project momentum.
The new system will generate automated communications to contractors such as emails to follow up on the tender, snag, survey/design, and contractor invoices. This will help to keep the process moving smoothly and efficiently.

Opportunity to Determine Best Price and Standardise Pricing Decisions

The procurement process may have several contractors involved. To determine whether the tender responses are reasonable and competitive, Superhomes will be able to see line-level detail on the last ten jobs in the area, including the estimated prices for the work. Thus, providing a standard framework for determining which tenders for works with Superhomes will be successful and best price for the customer. This will also provide data for Superhomes when they are submitted tender quotation which applying for larger projects with multiple properties, in the future.

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Standard Rates and Elimination of Work

Supplier Pricelists will be maintained in the system where possible, giving per-unit prices that can be automatically used to generate suggested QR responses for the contractors. Contractors can then review the QR with expected prices and update as necessary before submission. This will reduce the volume of work required by all parties and provide a more consistent and reliable pricing framework to base quotes to customer for individual properties and will support larger tender prices for projects with multiple properties to be retrofit.

Project Visibility

The Contractor App will prompt Contractors to update their Projects with respect to expected completion dates for Milestones and project delivery progress. Contractors will flag completed Milestones, and Superhomes Engineers will be able to indicate that they concur with the completion status. This feature will facilitate up-to-date feedback to customers.

Standardisation of Contracts

An application is being used for electronic signing of documents supporting contracts, contract amendments and certification of retrofit delivery works. This application integrates with the Microsoft Suite and will integrate with the Superhomes system.

Standard customer contract templates have been developed to support customers during their retrofit project. These contracts cover generic details such as responsibilities, health and safety, and insurances, and also project specific details such as project cost, scope of works, and payment schedules. When signed electronically, these contracts will inform the finance system for setting up sales orders and invoicing plans. The application also sends signed contract copies to both parties (the customer and Superhomes) and update the Superhomes file repository.

Stand contractor contract templates have also been developed to support contractors during their provision of retrofit delivery measures. These contracts cover both generic and project-specific details. When signed, both parties receive a copy of the signed contract, the finance system will automatically generate purchase orders and payment plans, and the Superhomes file repository will be updated.

The finance system is part of the overall Superhomes system. Therefore, progress on site and associated tracking and monitoring endeavour data will flow through to the finance system to trigger accounts receivable and accounts payable activities, such as invoicing and payment certification processes to evidence agreement between Superhomes and the Contractor that works are in line with those logged elsewhere during the customer journey processes. This will also support cost management.

Conclusions

The transformation of the retrofitting programme into an attractive Customer Journey whereby a customer doesn't just live the retrofitting passively: he/she is opting to consciously for a profitable investment that will bring savings in energy bills, improved comfort in the property and additional value in his/her asset, will continue for Superhomes.

Many factors are critical to continuing this customer journey and business optimisation and ensuring success. Focus will continue as follows:

Organisational factors:

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

The Core Purpose of Electric Ireland Superhomes (Superhomes) is: "We empower our customers to achieve warmer, healthier, low-carbon homes". This is supported by the values and culture of the OSS.

The values of the OSS support this commitment and are as follows:

- Integrity
- Customer Centric
- Quality and Innovation
- Inclusion

Every step, focus, considered solution and decision by Superhomes is underpinned by these values. These support the ideology of creating a 'state-of-mind' whereby customers have visibility on each step of the customer journey map and receive constant feedback and information as required. The Superhomes system is aimed at creating space whereby customers do not get lost in their journey and can maintain a high degree of control in the process with a system in place that speaks to the crucial role of transparency and structured process management to allow this.

Ongoing Focus on Innovation will include:

- Exploration and development of digital solutions 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

The development of the customer journey and business optimisation planning journey of Superhomes is will be on-going with a clear focus on quality and innovation across all service provision steps and across all departments, with a customer centric value system. This process facilitated design thinking methods and identification of opportunities for Superhomes to innovate and remain true to Superhomes values included staff from all departments, managers and several stakeholders.