

Citizens Advice

Energy advice strategy



Energy advice strategy

Introduction

Following a recent mapping exercise of the current energy programmes delivered across the service (England and Wales), to help establish our service **offer** within this sector, we have developed a working strategy which is aimed at creating a framework and delivery model to deliver a seamless customer journey for energy consumers.

Citizens Advice already plays a major role within the energy sector, from our research and campaigning work through to providing help and support to clients at the heart of the community via our bureaux network. As the government funded organisation delivering energy advice and education across Great Britain we offer clients access to energy advice and information by telephone or 24 hours a day via our website.

This paper outlines our proposals which aims to create a structured pathway that helps a client through the journey; in essence, piecing the jigsaw together. We welcome everyone involved to help us join the gaps across the energy landscape.

Why do we need an energy strategy now?

- April 2014 Citizens Advice and Citizens Advice Scotland became the statutory consumer advocate for energy consumers in Great Britain.
- Citizens Advice is increasingly being asked to support energy campaigns and new initiatives.
- Energy prices continue to rise affecting many households. *The cost of energy prices along with the rising cost of living means that more households are struggling to afford their energy bills and many are being forced into fuel poverty.*
- Consumer trust and confidence in the industry is at an all-time low.
- Consumers need to understand the benefits of making the right choices and what options are available in the market.
- Competition in the market for providing energy and energy efficiency advice.
- Government rollout of Smart Meters starts late 2015.
- To keep pace with market and client behaviours and the economic climate changes.

Our vision

Citizens Advice leading the way at the forefront of advice and support for clients affected by rising energy prices. Helping to improve the experience and outcomes for clients; achieved by providing access to a consistent minimum standard of energy advice and information for clients, irrespective of the client's preferred channel.

Aims

- To improve the customer journey for our clients across the energy landscape.
- To improve the experience of and outcomes for people affected by the increase in energy prices.
- To provide a consistent approach to energy advice and support offered across all channels.
- To work in partnership with the network to provide a joined up approach to our service *offer*.
- To work together with our stakeholders and the wider energy landscape to provide a joined up approach to our service *offer*.
- To create a model which is flexible enough to integrate with other service programmes of work.
- To create a framework which enables us to consider new initiatives using the evidence we have to ensure that they offer the best service for clients.
- To use the collection of intelligence, data and our clients experiences to help inform and influence change in this sector.
- To work effectively across the landscape to maintain our impartiality on representing energy consumers whilst we develop our service *offer* for the benefit of our clients.

Objectives

For our clients

- To embed energy advice into our core advice framework, to provide a consistent approach to energy advice and support offered across all channels.
- To implement a seamless referral mechanism process (eg mid call transfer, email) for debt, consumer issues, welfare benefits, financial capability. (eg bureaux, consumer service and the Extra Help Unit (EHU) CAS).
- To implement a seamless referral route with other partners and other sector experts taking account that there may be differences across England and Wales. Eg energy efficiency advice and the installation of energy efficiency measures.

For the network

- To equip the service with the tools and resources they need, ensuring our current resources are joined together.
- To work in partnership with the network to make the best use of skills and knowledge
- To support and facilitate learning around early intervention into the energy market, providing a suite of learning materials and tools to suit the chosen delivery method.
- To help to strengthen local partnerships with other agencies and look for innovative and efficient ways of working.

For the service

- To create a set of clear and measurable quality standards which can be used to monitor the impact on the service and the effectiveness of our work.

- To create a framework which enables us to assess whether a campaign/new initiative is beneficial to the client and or our service.
- To use the collection of intelligence, data and our clients experiences to help inform and influence change in this sector.
- To bid for services that compliment and add to our service *offer*.
- To lobby and influence for new initiatives to best help our clients.

How will we achieve this?

- Embed energy advice into our core advice framework, so advice and support can be offered irrespective of where the client enters our service.
- Ensure our current resources are joined together and enhanced, such as Advisernet, and the education materials.
- Equip the network with the tools and resources they need, along with ensuring everyone understands their role.
- Ensure our advisers are trained and skilled to an agreed level and develop their understanding of the 'triggers' which can be used to diagnose whether a client may benefit from energy advice and support.
- Ensure the pathway is integrated into our money and financial capability advice models.
- Work in partnership with the network to make maximise efficiencies.
- Build on our relationships with our stakeholders and other sector experts to promote collaborative working.
- Broaden our referral routes with energy suppliers and other organisations.
- Develop and establish referral routes for clients in immediate vulnerable situations eg off supply.
- Build the profile of our statutory role for energy, both at a local and national level.

What will our energy advice model look like?

Resources to support advice, information and to facilitate learning:

For the client

- A toolkit available online, used over the phone and or face to face with built in referral routes to create a seamless customer journey for the client.
- Step by step guides to help clients resolve their own problems incorporating early intervention into preventative measures.
- Follow up action plans and or sessions to monitor client outcomes.

For the service

- Share best practice to ensure we continually develop and build our resources.
- Clear measures to track the success of the a programme of work or campaign.
- Built in review phases to ensure we continually looking for ways to enhance, refine and streamline our service *offer*.

What will it look like for the client?

A step by step guide – known as an energy tool kit – will welcome a client accessing the service, irrespective of the chosen channel of entry. A standard set of questions will be used to assess which pathway is most appropriate for the client. The pathways will be designed to be flexible, meaning that if a client needs to change channel along the journey they will feel supported throughout the stages.

What will it provide the service with?

The energy advice framework / model will enable us to:

- Make decisions whether to be involved, to what level and how to market shape any proposed area.
- Develop and build on our resources in this area; a suite of energy resources and proven referral pathways which provides longevity and sustainability for the network and our stakeholders.
- Influence policy makers and funders to ensure when decisions are made they provide better outcomes for our clients.
- Influence and negotiate better funding deals for the network and maximise the income coming into the service for energy advice.

How will we know what good looks like?

Our energy advice framework will help provide clients with a seamless customer journey and also enhance our profile within the energy sector.

Our clients will:

- Receive quality advice, information and support no matter which channel they chose to access our service.
- Clear advice pathways integrated to our other programmes of work and referral partners.
- Access to tools and self-help at their convenience.

Our network will:

- Have access to the same tools and processes to support clients.
- Have access to bespoke materials to support learning in the sector.
- Have better relationships with stakeholders and other sector experts.

Our service will:

- Be viewed as the one stop shop for energy advice and information.
- See a reduction in footfall into a bureaux for energy related enquiries.
- Increase capacity to help those clients in most vulnerable situations.
- Improve outcomes for our clients in the energy sector.
- Better influence policy on energy issues.

Key priorities and next steps

Phase one – January 2015 onwards

- Review communications across the service, ie bureaux network, consumer service and EHU to build awareness and strengthen referral mechanisms.
- Review our current referral pathways across the service with the energy suppliers, ie bureaux, consumer service and EHU.
- Review our current energy education materials and adviser materials with a view to updating and developing new materials.
- Create an energy working group to discuss key areas of work and agree a plans for phase two.

Phase two – February 2015 onwards

- Create a working group with key representatives from Citizens Advice, Citizens Advice Scotland, including bureaux and stakeholders, such as DECC, OFGEM and energy suppliers.
- Develop an energy advice model which works across all channels.
- Develop referral pathways with key stakeholders.
- Develop quality standards and measures which benefit Citizens Advice and our stakeholders.
- Develop tools and resources, including training, to support advisers.
- Consult and test the model with bureaux and the consumer service / EHU.

Our aims

- To provide the advice people need for the problems they face.
- To improve the policies and practices that affect people's lives.

Our principles

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.



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