

Flex Community™ Customer Journey

Stage 1: Engaging

This stage comes **before an individual is invited to join the Flex Community™ via the portal**. The aims of this stage are to:

1. Build awareness of Flex Community™ and its objectives, including the fact that this is a trial.
2. Establish contact with them prior to accessing the portal so we can gain feedback and learning based on their experience of joining the Flex Community™.

STEPS	DETAILS
1. They find out about Flex Community™	<p>Flex Community™ promoted via email, social media, events, community networks etc directing people to:</p> <p>Flex Community™ webpage</p> <p>Where they can complete an Expression of Interest</p>
2. They register interest in Flex Community™	<p>They complete the online Expression of Interest (EOI):</p> <ul style="list-style-type: none"> • Name / Email / Post code (to check if they are within the BWCE area) / Telephone number • Consent to be added to a mailing list • Installed/planning to install heat pump • Installed/planning to install EV charge point • Have an Immersion Heater (primary use) • Questions / comments <p>Note: These details will only be accessible by BWCE staff members working on Flex Community™ (in accordance with BWCE's Privacy Policy).</p>
3. They are added to the Flex Community™ contact list	<p>Set up on an Excel spreadsheet only accessible (via OneDrive) to BWCE staff members working on Flex Community™</p>
4. They receive a response to questions raised on the EOI	<p>Response via email from BWCE to 'standard queries'. BWCE seeks input from Stemy before responding to more complex queries.</p> <p>Questions and responses are logged and added to FAQs on the website if appropriate.</p>

<p>5. They are provided with an opportunity to attend a project information session (face-to-face or online).</p>	<p>Meeting to provide the opportunity for potential participants to:</p> <ul style="list-style-type: none"> • Receive a presentation on the project • Ask questions • Discuss the project with other potential participants • Meet the organisers • Gain a feeling for being part of the Flex Community™ <p>Meeting to provide the opportunity for BWCE/Stemy to:</p> <ul style="list-style-type: none"> • Gain the trust of potential participants • Assess the understanding of potential participants • Assess any issues regarding the suitability of potential participants. <p>Notes:</p> <ul style="list-style-type: none"> • These invites will only be sent to people who have registered their interest.
<p>6. They are asked to complete an online Energy Awareness and Attitudes Survey</p>	<p>This is to collect baseline information on participants to contribute towards the learning of the project. It is a prerequisite to receiving the Portal link.</p> <p><u>Energy Awareness & Attitudes Survey</u></p>
<p>7. Once they have completed the survey they are invited to access the Flex Community™ portal</p>	<p>An invite is sent from the Flex Community™ Portal.</p> <p>A separate email is sent with the following documents attached:</p> <ul style="list-style-type: none"> • Portal Guidelines • Portal Feedback Template <p>They are asked to (but not required to) provide feedback on their user experience of the Portal.</p>

Stage 2: Uploading details on the Flex Community™ Portal

The **Flex Community™ Portal** developed by Stemy Energy in collaboration with BWCE is the website which enables householders to join and participate in Flex Community™.

The Flex Community™ Portal will enable them to:

1. Upload information to build up a comprehensive smart energy profile.
2. Apply to install Stemy smart technology to enable any existing energy technology they have to provide flexibility to the electricity grid.
3. Apply to install new energy technology (e.g. heat pump, EV charge post) PLUS Stemy smart technology enabling them to provide flexibility to the electricity grid.
4. Arrange site surveys with potential installers and choose which one they wish to proceed to installation with.

5. Arrange an installation date.

Once they have arranged an installation date (5) they will **go outside the portal to complete their installation** and make the necessary **contractual arrangements with the installer**.

STEPS	DETAILS
8. They register as a user on the Portal	<p>This creates their unique password-protected account.</p> <p>By registering, they are agreeing to the Terms and Conditions, with its associated Privacy Policy, which cover their use of the Portal.</p> <p>They receive an email from Flex Community™ confirming their successful account set-up.</p>
9. They complete My Profile	<p>All users need to complete My Profile. This is where they provide the following information:</p> <ul style="list-style-type: none"> • Personal data. • Property – age, size in square metres (all floors), photos of property, fuse box and electricity meter. • Electricity supply – supplier and tariff. • Energy efficiency measures – cavity wall and loft insulation, double glazing plus a photograph of their Energy Performance Certificate (EPC) if available. • Internet connection. • Existing technology installation(s). <p>This information is used to:</p> <ul style="list-style-type: none"> • Assess technical eligibility for the different Plans on offer. • Ensure that there is a baseline of information to determine whether flexibility services can be provided. • Provide installers with householder details if and when they are asked to provide a quote for the installation of an energy technology. <p>Completion of all questions in this section are required before users can proceed to the next step.</p>
10. They complete one or more Plans	<p>A Plan is a combination of energy technology (e.g. heat pump) PLUS smart technology to enable the energy technology to communicate with the electricity grid via the Flex Community™ intelligence to offer flexibility.</p>

	<p>Currently the following Plans are available on the Portal:</p> <ul style="list-style-type: none"> • Heat Pump Plan – to install a heat pump plus Stemy technology to provide flexibility. • EV charge point plan - to install an EV charge point plus Stemy technology to provide flexibility. • Flexibility Plan – if they want to offer flexibility from existing energy technology i.e. a Heat Pump, EV charge point or Immersion Heater, in their home. <p>To apply for a Plan they will need to complete a questionnaire. The introduction to each Plan Survey details the information they will need to have ready to hand to complete the questionnaire.</p> <p>Email addresses to ask for support and a set of FAQs are also available in the Portal.</p> <p>Details on the Stemy smart devices householders will need to install to connect their existing and/or energy technology to the grid is available in the Plan Actions section.</p> <p>By registering on the Portal and applying for a Plan a householder is not yet committing themselves to participate in Flex Community™.</p>
<p>11. They receive confirmation of their Plan application and what happens next.</p>	<p>Emails sent by Flex Community™.</p>
<p>12. They are informed whether or not they have been approved to join a Plan.</p>	<p>Approval decisions are made in weekly meetings between BWCE and Stemy Energy. Approval may require further information to be provided regarding the householder's specific circumstances.</p> <p>If they are approved for either the Heat Pump or EV charging point plan they will go to: Stage 3a: Installation of Flex enabled Energy Equipment And then to: Stage 3b: Installation of Stemy Technology to make existing or newly installed Energy Equipment Flex enabled.</p> <p>If they are approved for the Flexibility Plan they will go to: Stage 3b: Installation of Stemy Technology to make</p>

	<p>existing or newly installed Energy Equipment Flex enabled.</p> <p>If they are <u>not approved</u>, they are informed of this decision and the reasons why it has been made.</p>
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Stage 3a: Installation of Flex enabled Energy Equipment

STEPS	DETAILS
<p>13. They are required to sign Third Party Plan Terms & Conditions (including associated Privacy Policy) relating to installation before they can proceed.</p>	<p>Terms and Conditions with Consumers in relation to Third Party Providers Plans, which cover their application for the installation, operation and use of the energy equipment supplied by the third-party providers, and also cover the required installation and use of Stemy Equipment which enables the Energy Equipment to offer simulated flexibility to the electricity grid</p> <p>These Terms & Conditions do not commit the householder to install any Energy Equipment in their property. The final decision to install will be made between the householder and an installer and the contract will be between the two. However, by signing these Terms & Conditions they will be making an agreement that:</p> <ul style="list-style-type: none"> • Any third-party installers they are introduced to via the Portal will only be able to install Energy Equipment with flex-enabled energy technologies; PLUS, • Locally-based electrical installers will install the Stemy Equipment to enable them to offer flexibility.
<p>14. They receive an invitation from the installer(s) to arrange a pre-installation evaluation visit(s)</p>	<p>The following steps take place via the Flex Community™ Portal, leading up to the householder receiving the invite to arrange a pre-installation evaluation visit:</p> <ol style="list-style-type: none"> a. After signing the Terms & Conditions outlined above, Stemy will create a solution for the Plan and upload it to the Portal. This solution is Stemy's identification of suitable Energy Equipment product(s) that are likely to meet the householder's needs. b. BWCE assigns installer(s) to the solution(s). c. Flex Community™ sends an email to the assigned installers informing them that they have a potential customer and

	<p>inviting them to contact the potential customer direct to discuss their needs and arrange an evaluation visit (if necessary).</p> <p>d. The installer and customer agree an evaluation visit date over the phone and the installer uploads the agreed date to the Portal as a record.</p>
15. They have one or more pre-installation survey carried out	Pre-installation/evalauation survey(s) carried out.
16. They receive quotes and designs/plans of the proposed installation	<p>Installer(s) quotes and plans are uploaded onto the Portal for householders to view and include details of Energy Equipment that they propose to install.</p> <p>The householder is also informed of any electrical remedial work that they need to carry out (at their own expense) prior to installation.</p>
17. They choose an installer to carry out the installation	<p>Once all the installer(s) have uploaded their quote(s) to the Portal, Stemy checks that it is complete. If it is, Stemy 'approves' the quote and the householder is notified by email to check and choose a quote on the Portal.</p> <p>The householder will accept the quote from one installer and contract them to carry out the installation. This is done outside the Portal directly with the installer.</p>
18. They book the installation date	<p>When the householder has chosen a quote, the installer receives an email that their quote has been selected</p> <p>The installer and customer agree an installation date over the phone and the installer uploads the agreed date to the Portal as a record.</p> <p>The installer uploads the installation details to the Portal, which the householder can see in their account.</p>
19. Installation is carried out	<p>Their Energy Equipment (e.g. heat pump or EV charge point) is installed.</p> <p>Contractual arrangements for installing a heat pump or EV charge point will be between the householder and installer.</p>

	Once installation is complete go to Stage 4: Providing Flexibility.
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Stage 3b: Installation of Stemy Technology to make existing or newly installed Energy Equipment Flex enabled

STEPS	DETAILS
20. They are required to sign Flex Plan Terms & Conditions (including associated Privacy Policy) relating to installation before they can proceed.	Terms and Conditions with Consumers in relation to Stemy FLEX Plans, which cover the required installation and use of Stemy Technology which enables the Energy Equipment they have, or will have installed, to offer simulated flexibility to the electricity grid.
21. They arrange an installation date with an electrician	<p>The following steps take place via the Flex Community™ Portal, leading up to the householder receiving the invite to arrange an installation visit from the electrician:</p> <ol style="list-style-type: none"> 1. After signing the Terms & Conditions outlined above, Stemy will create a solution for the Plan and upload it to the Portal. This solution is Stemy's identification of the required Stemy device to enable the householder's Energy Equipment to offer flexibility to the grid. 2. BWCE assigns electrician(s) to the solution. 3. Flex Community™ sends an email to the assigned electrician(s) informing them that they have a householder who requires Stemy device to be installed and inviting them to upload a quote for their time to undertake the installation (the Stemy Technology is provided free-of-charge). 4. The electrician(s) uploads their quote to the Portal. 5. Stemy checks that it is a valid quote. 6. If it is, BWCE selects the preferred electrician and they receive an email of confirmation.

	<p>7. The electrician and customer agree an installation date over the phone and the electrician uploads the agreed date to the Portal as a record.</p> <p>8. The electrician uploads the installation details to the Portal, which the householder can see in their account.</p>
22. Installation is carried out	<p>The Stemy Equipment is installed.</p> <p>The householder will receive guidance from installer on how to use the Stemy App to register and activate the Stemy device in their home.</p> <p>The householder will also have received the App Manual and Quick Guide prior to the installation.</p> <p>Stemy Energy are available for remote technical support if required.</p> <p>Once installation is complete go to Stage 4: Providing Flexibility.</p>

Stage 4: Providing Flexibility

This stage applies to those householders who have either:

- Completed and been accepted onto a Flexibility Plan for existing Energy Equipment.
- Installed flex enabled Energy Equipment via Flex Community™.

STEPS	DETAILS
23. The Stemy Equipment has a period of time in manual operation	A period of time in manual mode is used to build up an energy use profile of the Energy Equipment (e.g. heat pump, EVCP immersion heater)
24. The Stemy Equipment is put into automatic mode (intelligence on) by the householder via the App but with no flexibility offered	<p>Stemy will send an email to householders when they have sufficient background data and are ready for the householder's App to be in automatic mode.</p> <p>There will be a period of time when the Stemy platform optimises the householder's use of their Energy Equipment based on their preferences during the manual mode and other factors (e.g. presence of solar pv or a Time of Use Tariff).</p>

25. The Stemy Equipment in automatic mode (intelligence on) but with internal flexibility simulation	A period of time when the Stemy platform simulates flexibility requests.
26. The Stemy Equipment in automatic mode (intelligence on) but with external flexibility simulation	A period of time when the Stemy platform simulates flexibility requests from external signals i.e. WPD's Flexible Power Platform