

**NEXT GENERATION  
NETWORKS**

CarConnect  
Customer Engagement Strategy



Report Title	:	CarConnect Customer Engagement Strategy
Report Status	:	FINAL
Project Ref	:	NIA_WPD_013
Date	:	15.06.2016

<b>Document Control</b>		
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<b>Revision History</b>		
Date	Issue	Status
26.05.2016	1.0	Draft
13.06.2016	1.1	FINAL

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## 1. Introduction

### a) The CarConnect project

CarConnect<sup>1</sup> is a pioneering project that will help the electricity industry better understand how plug-in electric vehicles (PIVs) charge at home in harmony with the electricity grid. This £5.8m project will give Western Power Distribution and all other GB Distribution Network Operators (DNOs) an assessment tool and product-based solution that will enable DNOs to plan for and manage Plug in Vehicles and vehicle to grid services on their distribution networks.

Electric and plug-in hybrid cars are becoming a practical choice for drivers, with the variety of makes and models available on the market continuing to increase. In the last two years alone, the UK has seen a 716% increase in PIV registrations. With increases in battery size and charger rating, PIVs and hybrids are set to become commonplace, with a widening mass appeal. By the early 2020s there could be as many as one million ultra-low emission plug-in-vehicles on UK roads.

As groups of neighbours acquire PIVs, localised clustering of demand is likely to cause problems for the network, as proven through the (Low Carbon Networks Fund) My Electric Avenue (MEA) project. MEA showed that approximately 30% of GB low voltage networks will need reinforcement by 2050, if adoption of electrification of transport is widespread. This represents a present day cost of £2.2bn to UK customers – based on UK Government forecasts of nearly 40 million PIVs on UK roads by that time. UK Government is committed to the electrification of transport – as illustrated by its recent investment into ultra-low carbon vehicles such as its extension of grants for PIV chargers, PIV car subsidies and the Go Ultra Low Cities Scheme.

In addition, vehicle to grid (V2G) services and associated technologies are being developed in the UK. The impact of mass V2G services on LV networks needs to be understood, especially as some V2G services (such as transmission frequency services) may conflict with distribution network operational priorities.

This project will enable WPD to identify which parts of their network are likely to be affected by PIV/V2G uptake, and whether PIV demand control services are a cost effective solution to avoiding or deferring reinforcement on vulnerable parts of their networks. This learning can also be applied by all GB DNOs.

The project will run for three and a half years. It will provide an assessment tool to predict where PIV/V2G market penetration may cause network problems. Where this effect is observed, the PIV Demand Control Services developed as a direct output of the project, will offer a cost effective and rapidly deployable solution to mitigate PIV/V2G induced network

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<sup>1</sup> 'CarConnect' is the formal and registered project name for contractual and reporting purposes. The brand name may be different for customer-facing recruitment and dissemination purposes.

stress. The key benefits of these two project deliverables will be to enable DNOs to permanently avoid or at least delay the need to reinforce networks, and to reduce the cost impact of electrification of transport on customers, and so lessen the likelihood of severe customer service issues.

CarConnect is hosted by Western Power Distribution (WPD), the distribution network operator (DNO), and delivered by EA Technology, DriveElectric and Lucy Electric Gridkey. Transport Research Laboratory (TRL) will take on a project oversight role, on behalf of WPD. Funded through the Network Innovation Allowance, CarConnect will find solutions that could avoid the need to replace electricity substations and cables to customers' homes and workplaces, saving significant cost and disruption to customers.

### **b) Who are we engaging with and why?**

Set to be the largest PIV project in the world, CarConnect will be working with up to 700 EV drivers (customers) in its trials to ensure that such systems are acceptable. The project will engage only with domestic or small business customers for the purposes of the trials. Public charging and its infrastructure is outside the scope of this project.

The trials will:

- Develop and deliver an electricity network modelling tool that will enable WPD to identify which parts of their network are susceptible to plug-in-vehicle loads and to assess solutions to avoid network reinforcement works.
- Develop a method for monitoring the effect of plug-in-vehicles on low voltage networks that will inform the network modelling tool development.
- Recruit and manage a mass-market customer trial to prove the technical/economic viability of plug-in-vehicle/V2G demand control to avoid or defer network reinforcement.

Development of the LV Network Assessment Tool and functional specification and commercial framework for PIV/V2G Demand Control Services will be informed by the large scale field trial involving up to 700 PIV drivers that will:

1. Expand current understanding of the demand impact of charging at home on electricity distribution networks of a diverse range of plug-in-electric-vehicles (PIVs) – extending charge rates to 7kW+, introducing vehicle to grid technology and a range of battery sizes from 20kWh to 80kWh+.
2. Build a better understanding of how vehicle usage affects charging behaviour given diversity of charge rate and battery size.
3. Evaluate the reliability and acceptability to customers of PIV/V2G demand/export control services and influence these have on driving and charging behaviour.

4. Build the evidence to support the business case and associated policies, procedures and technical/commercial documentation for DNOs for implementing PIV/V2G Demand/Export Control to avoid or delay network reinforcement.

The project focuses on the electricity network that supplies homes and small businesses - the low voltage (LV) network. Electricity networks are built to provide energy to customers in a secure, reliable, and sustainable way. The project will trial and demonstrate practical and cost-efficient solutions to alleviate the potential impact of PIVs being charged on a local network. These local networks will be a mix of urban, suburban and rural. The geographic focus will be WPD's licence areas.

Customers will be engaged to take part in the trials through a strategic marketing and communications campaign. In order to qualify to take part, they will need to be an existing or new PIV driver (in order to qualify for the reduced cost charging point via the UK Government's electric vehicle home charge scheme<sup>2</sup>), have off-street parking, and have a property that is suited to have a charging point installed.

Customers may be incentivised to take part through:

1. Having their (domestic) 'smart' charging point freely installed
2. Repayment of the cost of the charging point (i.e. the amount of money that the customer pays for the charging point after the grant has been deducted) by instalments over the lifetime of the trial period, to encourage the customer to remain engaged in the trials
3. The opportunity to take part in the world's largest PIV project; empowerment through knowledge and helping to shape the PIV charging future
4. A limited trial offer – limited number of trial spaces for each type of PIV currently on the market

Each trial participant customer will need to sign up to commit to taking part in surveys to have their driving and charging habits recorded, and to give insight into how they accept having their PIVs controlled.

Customer engagement for the purposes of CarConnect means:

- Communication with customers through a variety of media, to raise awareness of the project, its trials, results and benefits arising from the project
- Communicating with and engaging directly with customers to recruit them for the trials

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<sup>2</sup> <https://www.gov.uk/government/publications/electric-vehicle-homecharge-scheme-guidance-for-installers-2016>

- Communicating with and engaging directly with people in their homes for the purposes of systems integration (i.e. support with the integration of home broadband with project trial technology)
- On-going communication with customers taking part in the trial programme for survey purposes, feedback and to pick up any issues or highlights
- Provision of clear channels of contact for trial participants for any issues arising during the lifetime of the trials (smart charging point maintenance, general queries etc.)
- Managing customers leaving the trial programme
- Managing termination of smart charging point agreement at end of the trial period
- Communication of project outputs and learning

Confirmation of recruitment will be a two-stage process:

- a. Declaration of Intent (DOI) Form (or equivalent as defined by DriveElectric) – this will capture a customer’s honest intent to take part in the trials. At this stage DriveElectric will have assessed the customer for eligibility in terms of having off-street parking and ability / need to have a smart charging point installed, and PIV driver status (i.e. whether the customer is a new or existing PIV driver).

The signed DOI forms will give an indication of customer trial participant pipeline for Project reporting purposes.

- b. Service Agreement – this constitutes formal customer trial participant engagement in the Project trial programme, and incorporates the legally binding smart charging point agreement. The Service Agreement defines customer obligations under the trial, and terms of engagement with relevant Project partners (e.g. customer research subcontractor for survey and behavioural analysis purposes), as well as covering customer withdrawal from the trial and the engagement decommissioning process.

A customer recruitment journey flowchart is located in Appendix B.

This Customer Engagement Plan (CEP) details the arrangements that the project has made for engaging with ‘relevant customers’. A relevant customer is defined as ‘a customer with a profile class of 1, 2, 3 or 4 as defined in Part 2 of Schedule 16 of the Distribution Connection and Use of System Agreement (DCUSA) and includes both domestic and small business properties.

### **c) How will engagement be targeted?**

Although there is no geographical limitation to the trials, in the interest of manageability for recruitment and charging point installation purposes, and ultimately for the benefit of the customer to facilitate excellence in customer service, the focus of the engagement will be WPD’s licence areas for the first six months from commencement of recruitment activity.

See map in Figure 1. This covers three of the four Go Ultra Low Cities winners of Nottingham, Milton Keynes and Bristol (the one outside of WPD’s area being London); these cities have received funding specifically to support and encourage uptake of PIVs. The fact that WPD’s licence areas encompass three of the four Go Ultra Low cities is a further driver to concentrating on this swathe of GB initially, in order to capitalise on PIV awareness and therefore potentially heightened customer enthusiasm for being involved in such trials.

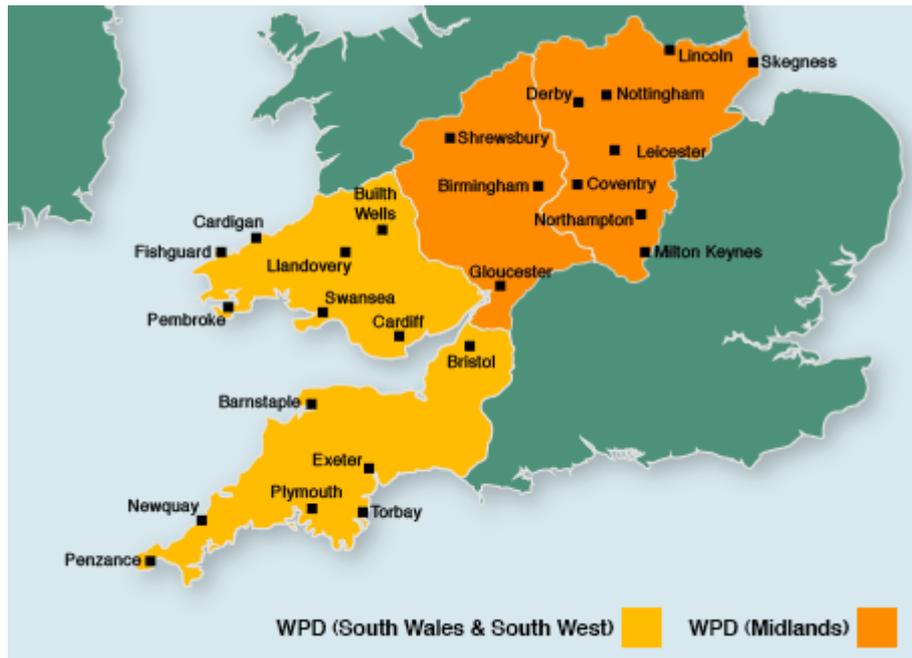


Figure 1: Map of Western Power Distribution’s licence area

When six months of active customer recruitment activity has taken place, a decision will be taken by the project team as to whether there is a need to extend the geographical focus to the rest of GB.

The process for customer engagement is defined in Section 2.

## 2. Communications Strategy

**Governance requirement:** The plan must include a communications strategy which sets out inter alia:

*'Any proposed interaction with a Relevant Customer or premises of a Relevant Customer or proposed interruption to the supply of any Customer for the purposes of the Project, and how the Customer will be notified in advance; Ongoing communications with the Relevant Customers involved in the Project; Arrangements for responding to queries or complaints relating to the Project from Relevant Customers.'*

### a) Customer interaction

Up to 700 new PIV drivers will be recruited, in order to provide the project with statistically significant data. The types of PIVs in the trial will span across a range of PIV makes and models. DriveElectric will deliver all aspects of trial recruitment and delivery. Trial participants (customers) will be sought from a wide area across WPD's licence areas, concentrating, but not exclusively, on larger conurbations and in particular the recently announced winners of OLEV's Go Ultra Low City Scheme in WPD's licence areas, namely Milton Keynes, Bristol and Nottingham. While this will be a relatively easy route to recruitment (compared with trying to create clusters on LV feeders or areas), this will mean the trial can only simulate demand control, rather than demonstrate demand control in, say, an LV area. However, if a naturally occurring cluster of EV materialises, then real-time demand control may be trialled.

Recruitment will be assisted through marketing and PR activities delivered by a subcontractor or subcontractors, managed by EA Technology.

DriveElectric's recruitment team will manage the process of volunteers being vetted and progressed to becoming active trial participants. The eligibility criteria may be found in section 2 (a) (ii).

The project will provide trial participants with 'smart' chargers for their home. Once recruited, customers' chargers will be installed and cars will be delivered. Customers will be formally engaged in the trial upon signing the relevant and agreed contractual paperwork (DOI followed by Service Agreement – see section 1(b)), and data collected from that point.

This data will be used to inform development of the control algorithm and research into customer behaviours relating to their journey planning and charging behaviours.

Initially, PIV demand control will be based on an initial algorithm, using typical curtailments from the My Electric Avenue project. As data comes in and the control algorithm is refined, charging curtailment will be changed to reflect likely scenarios produced by the algorithm (simulation of control, rather than physical demonstration). Customer acceptance of charging restriction will be assessed by a contracted market research company.

If vehicle to grid (V2G) chargers are deemed sufficiently developed during the trial period, and subject to market conditions and availability, V2G chargers will be introduced into the trial, with a group of customers being supplied with V2G chargers. Data gathered from this group will be used to enhance the control algorithm and then simulate the use of V2G.

Customers lie at the heart of the project, and support will be provided at every stage of the trial lifecycle to ensure that customers' needs are met and exceeded wherever possible.

In a customer-focused trial of this scale, a natural attrition rate is to be anticipated. The project will mitigate against this by aiming to over-recruit at all times. Project management processes will pick up on attrition rate on a monthly basis once recruitment has commenced, and will define 'over-recruitment' approach as the project progresses. To further minimise attrition rates, a defined process will be put in place following initial registration of interest to recruit trial participants:

- A return email with further literature about the project (designed for consumer audience) will be sent.
- This will outline the benefits to and commitments or obligations required from trial participants.
- The email will be followed up with a telephone call to the individual to establish their level of interest and commitment to the project and would include a "brief" on the role of the trial participant and the project.
- Facilitate a sense of inclusion within the trials; the trial participants are all on a journey together with their PIVs. A similar tool could be used to establish a sense of community amongst the participants to encourage them to engage with the trial. The trials should be made fun to take part in; engagement may continue past initial recruitment in the form of competitions, bulletins and workshops.

Below details the customer engagement process which will be used for setting up the trials, together with the communications strategy that will be used to recruit and communicate with customers throughout the lifetime of the trials and the project.

### **i) How will the project engage and recruit customers for the trials?**

The communications strategy will include the utilisation of the following channels:

- Personal contact/referrals
- PR - Media lists will be developed for the distribution of press releases, key project information, opinion pieces, editors' letters etc. A media pack will be produced. Target media outlets will be both national and regional, encompassing specialist publications in the motoring/green/electric/low emission vehicle sectors, plus the energy, environmental, engineering, community/low carbon community sectors
- Website/s – project's own website and partner websites
- Go Ultra Low Cities
- Resource pack – to contain everything required for potential participants to engage with their neighbours, such as a letter template to circulate to neighbours with a tear-off slip for registering interest, posters for community notice boards, etc. This will be available for download from the website

- Social media:
  - Twitter (news updates etc.)
  - YouTube (a short initial video to be produced)
  - LinkedIn (spread word about the project via online business networking)
- E-newsletters, to people who opt in via the website
- Other marketing/communication channels of partners and stakeholders e.g.:
  - EV Network Group / Low Carbon Vehicle Partnership
  - Related projects e.g. Smart EV
  - PIV charging point companies
  - PIV retailers and car dealers
  - Other networking opportunities
  - Energy Saving Trust
  - Local Authorities that are highly motivated to encourage EVs (via their sustainability officers)
  - Green residential developments and cohousing, gated communities
  - Green newsletters, Low Carbon Communities Network
  - Companies with a sustainability agenda, via organisations such as Business in the Community
  - Trade associations (e.g. BEAMA, SMMT etc.)
- Events – speaking at existing events, and other possible opportunities such as PIV test drive events – using presentations, displays and printed materials. An events calendar will be developed.
- CarConnect website: A site plan and detailed content is to be developed, however navigation is likely to be based around menus such as the following:
  - Home
  - About
  - News
  - FAQs
  - Technical
  - Project and Learning Library
  - Media Library
  - Partners/Links
  - Contact
- The website will have the functionality to enable customers to check eligibility for the trials, to see latest project news, related articles, to keep up to date on trial progress and outcomes (project reports etc.).

- E-newsletters will provide updates during the early stage of the project. News updates will feed into Twitter and LinkedIn.

## ii) Recruitment for CarConnect trials

Interaction with customers will begin at the recruitment stage. Recruitment is wholly led and delivered by DriveElectric, with the marketing and PR support managed and delivered by EA Technology. There will be initial promotion of the project via publicity and online presence (LinkedIn and Twitter as well as content in online news and relevant special interest group's websites (such as low carbon communities) to recruit trial participants.

DriveElectric will maximise recruitment opportunities to the project through their day-to-day PIV leasing business and via local dealerships. Given the WPD regional focus, local radio adverts, local newspapers and companies will be approached to assist in promoting the project.

This initial promotion of the project will be undertaken in parallel with the development of a project website, set up to assist in large scale recruitment. Registrations of interest through the website will be followed up using an agreed process outlining roles and responsibilities, record keeping requirements and decision processes (for accepting or rejecting potential recruits according to recruitment eligibility criteria e.g. the need to have off-road parking to being able to install the charging point) throughout the duration of the project.

DriveElectric will arrange for free PIV drive sessions for interested parties to help build interest with potential customers and recruit to the trials. It is anticipated that the 'snowballing' effect, will support recruitment of customers in local areas; that is, DriveElectric will recruit participants through word-of-mouth. Interested customers will be encouraged to speak to their neighbours and friends in their local area to promote the trials and recruit as many customers as possible.

In addition to 'snowball' customer recruitment, DriveElectric will work with their existing customers and contacts to promote the project.

Any interested customers already on DriveElectric's current databases who have indicated a willingness to participate in trials or PIVs from past activities or conversations will be included in the mail out list to receive an initial information pack.

Engagement will include developing contacts with organisations and individuals, such as:

- To develop and deliver Pop Up Test Drive Events
  - Shopping centres
  - Community centres
  - Piggy-backing on other community events
  - Workplaces
- To develop "Champions" to recommend / communicate the project
- To develop and deliver home based "Tupperware party" drive events

- To develop relationships with Local Authorities who may have schemes in place around EV's
  - In particular winners of OLEV's Go Ultra Low City Scheme in WPD's licence areas, namely Milton Keynes, Bristol and Nottingham & Derby.
- To work with OEMs and Dealers who have electric car launches/events/deals
- To work with other "Green Tech Providers" who may have parallel markets
- To work with housing developers with an interest in energy efficiency

The Recruitment Engagement team will also be responsible for following up and contacting all expressions of interest in participating in the trial from the project website, social media, other online exposure and conventional PR.

### Incentivising customer participation in trials

All customers participating in the trials will be provided with a 'smart' charger. These cost more than simple 'dumb' chargers that are presently most commonly installed in customer homes. Currently all new charger installations can receive a UK Government grant of £500. The project will, in the first instance, provide 50% of the balance of cost of a smart charger, the customer paying the balance, which will be less than they currently pay for a simple charger. At the end of the trial, as long as the customer has met their obligations to the trial, for example providing information to the project systems through mobile phone apps and responding to questionnaires, the project will refund their contribution to the smart charger installation.

- In addition, the project will test whether customers need incentives to make PIV demand control more acceptable to them. Details of such incentive plans will be formulated during the trial design and development at the beginning of the project, but could include: Simple, single payments (cash or voucher) per charger control event
- More complex payments based on demand shift (i.e. how much charge was shifted by so many hours)
- Simulation of time of use tariffs (through rebates on power used for charging at particular times of day)
- No payment, rather information and intelligence related to the demand control system to empower and engage customers

Trial participants will be selected to test the efficacy of incentives, with some:

- Receiving no incentive payment
- Receiving a fixed incentive plan throughout the trial
- Cycling through different incentive plans during the trial

The customer research contractor will be tasked with gathering information from customers and evaluating the value and usefulness of such incentives in making PIV demand control more or less acceptable to customers.

All recruitment activities will be delivered by the Customer Engagement Team, led by the recruitment and customer engagement team leader. In cases of high customer/recruit engagement EA Technology team members and DriveElectric's staff will provide supplementary resource.

An information pack, including necessary information required to take part in the trials will be sent to interested parties and organisations to disseminate information locally. This will be provided electronically and will be available from the Project website. The pack will include information on:

- Future predictions for PIVs and their impact on networks and need for the project
- Objectives of the project
- Project partner details
- How the project is funded
- Eligibility to take part
- Brief summary of how a customer can get involved, including information on the trials and charging point installation, and a customer's obligations under the trial
- Contact details for further information, sign up or issues

If after receiving and fully reading through this information pack, customers remain interested in participating, they will be encouraged to provide a Declaration of Intent (DOI) to DriveElectric. The DOI will be recognised as a formal invitation from the customer for DriveElectric to carry out necessary assessments. The assessments will be carried out to ensure that the customer is eligible for the trial. Realistic timings for trial set up will be communicated to customers from the outset, to manage expectations and minimise any potential disappointment arising from (unlikely) delay due to project technicalities.

The Information Pack will also include information for arranging the installation of the charging point. Arrange installation of the charging point with the customer.

### **iii) Eligibility criteria to take part in the trials**

Customers will need to pass the following eligibility criteria to be accepted on to the project trials programme:

- Customers need to have off-street parking
- Customers need to have space and electrical capacity for a smart charging point to be installed at their home address
- Customers must be a new or existing PIV owner / driver
- Customers must consent to using their own PIV for the purposes of the trials
- Customers must commit to having their charging and on board vehicle data recorded and used for trial purposes
- Customers must commit to responding to behavioural research surveys

- Customers must commit to having their home broadband integrated with the trial technology
- Customers must commit to using a method of preference input, such as a mobile 'phone app/s to state preference and / or journey plans
- Customers must commit to taking part for the duration of the specified trial period, as per the signed (by the customer) Service Agreement

#### iv) How will customers be engaged with, once the trials start?

Appointments with customers will be made to suit customers' availability at all times, in order to install the smart charging point.

#### Charging point survey

The customer will have signed the DOI, which triggers invitation from DriveElectric to make an appointment with the customer to survey the domestic property for installation of the smart charging point. The charging point survey will be undertaken by an authorised contractor, of whom the customer will be notified by DriveElectric in advance of the appointment. The charging point surveyor will carry identification and will only enter on to the customer's premises as arranged and agree by the customer through DriveElectric.

#### Customer Service Agreement

Once the charging point survey has been undertaken, and it has been established through the survey that the property is suitable to home a charging point, DriveElectric will issue a Service Agreement to the customer.

The Service Agreement document forms the contract by which the customer enters into formal and legally binding agreement to take part in the trial. This signed document also provides irrefutable evidence of customer engagement and sign up to the trial.

#### Welcome pack

The customer will receive a welcome pack from DriveElectric, in electronic copy and hard copy on request. This will include the following for trial participants:

- Background to the trial, why it is needed and FAQs
- Maintenance, safety information for the electric vehicle
- Safety information for the charger and any other equipment in participants homes
- Who is involved
- Useful contact numbers
- Introduction pack from customer analysis contractor explaining:
  - Who will be involved from the customer analysis contractor including photos of project team
  - Options for communications with the customer analysis contractor (email, telephone or letter)
  - What they will be asking and what options are available for surveying

- Roughly when they will be contacted by the customer analysis contractor
- Information on downloads from the car or the charging point will be given including:
  - What data is recorded
  - How it is transmitted
  - How it is kept secure
- Important information regarding their obligations to the trial and contract conditions should they default on their payments for any reason
- A telephone number and email for DriveElectric in case of problems
- In the event that customers experience a problem, a checklist of information that customers will be expected to give over the phone/via email to help DriveElectric resolve the problem as quickly as possible
- Statement of preferred method of communication, to be sent back to the project partners for reference.

DriveElectric will be the main and only point of contact for customers on the project during recruitment and trial, to streamline communication through one project partner.

### **Installation of the smart charging point**

Once all the contractual paper work is complete, DriveElectric will arrange for the smart charging points to be installed. Communications will be via the customer's preferred medium.

A short interruption to the household's electricity supply will be required to connect the charging point to their electricity supply and a convenient time for this will be agreed with the household (using a method of communication agreed with the customer). As well as arranging a convenient time, customers will be asked which route of entry representatives of DriveElectric should use when visiting their house to install the charging point. Installations will be undertaken by a suitably qualified electrician briefed about the project and equipment. Any safety requirements required of the customer will also be agreed (e.g. ensuring pets and children cannot go near the area where work is carried out). When installing equipment in homes, care will be taken to keep disruption to the householder to a minimum. All staff will carry identification.

### **Broadband internet router and mobile telephone apps**

The Project may require access to customers' broadband internet router administration. There will be no interruption to internet or telephone service.

#### **b) On-going communication with customers**

Maintaining communication with customers over lengthy trials is crucial to ensuring the delivery of results. During the course of the trial, trial participants will be contacted by the customer analysis contractor to understand more about their everyday driving and charging habits. This will focus on adjustments in driving behaviour, problems encountered, any concerns they may have and satisfaction levels with the Technology. Customers will receive an information pack from the customer analysis contractor, including:

- Who will be involved from the customer analysis contractor, including photos
- Options for communications with the customer analysis contractor (e.g. email, telephone or letter)
- Roughly when they should expect to be contact to be made by the customer analysis contractor

Customers will be contacted by the customer analysis contractor to agree a convenient time and format for all the surveys. Customers will be invited to provide feedback in different ways, for example:

- Via the mobile 'phone app and / or website interface
- Workshops at a central location to the community
- Tele-surveys
- Written surveys
- Web forums
- Individual internet questionnaires
- Face-to-face interviews

The aim is to use a range of media for feedback and surveying that are convenient to customers. DriveElectric will ensure data security as described by the Data Protection Strategy. All staff will carry identification.

There may also be occasion to contact customers in cases where broadband internet communications issues are found, where the subcontractor may have to access the router remotely. In this case, the customer will be notified by DriveElectric and a mutually convenient time agreed for the access work to take place. The subcontractor will not need to have direct contact with the customer or enter the property.

Customers will also be contacted by DriveElectric to carry out a post-installation follow up check that the user is happy with using the smart charging point.

### **Contact numbers**

The contact number for all queries, issues or complaints regarding the project: 0333 300 1050

### **c) Queries, compliments and complaints**

As project recruitment lead, a general enquiries telephone number and email at DriveElectric will be provided for the duration of the project. Support will be available between 8:30am-5pm Monday to Friday. The contact number for DriveElectric will be: 0333 300 1050 and customers will be encouraged to use this number during these operating hours.

If a customer needs to get in touch out of normal office working hours, the customer will use the same number, which will then be routed through a hierarchy of project team members' mobile telephones.

DNO staff will be provided with information about the project and how to respond to queries, compliments and complaints about the project.

The complaints procedure and log held by DriveElectric are described in Appendix A.

### **i) Fault fixing**

DriveElectric will manage any calls regarding charging point faults during the office hours listed above. This relates only to the smart charging points installed at customers' premises under the CarConnect Project.

DriveElectric will have fault resolution processes in place prior to commissioning technology in substations. These will include:

- Spare smart charging point units and information so that faulty units can be replaced quickly with response staff briefed in how they should replace units.
- Training and information for customer service personnel about the smart charging point, where it is located and the information they should give to customers 'phoning in, the fault identification process and how to alert response staff.

Information on the process will be outlined in the welcome pack.

A log of faults will be kept.

### **ii) Interruption of supply**

In advance of the installation, customers will be advised that in order to install and remove the PIV charging point, they will experience a short interruption (up to 30 minutes). This will be indicated in the information pack and it will be explained to the customer by DriveElectric or their contractors and carried out at a convenient time.

### **iii) Withdrawal from the project**

The Service Agreement that customers will be asked to sign will include a clause to the effect that a customer signing up to the trial cannot withdraw part way through the project. A critical aspect of this trial is to obtain data from the same participants for the duration of the trial period. In addition to a contractual clause, DriveElectric will explicitly explain to customers during the process of signing up to the trial that they will not be able to withdraw, unless under exceptional circumstances.

Should customers need to leave the trial under exceptional circumstances (e.g. house move, death) DriveElectric will arrange a time convenient, following a time lapse period of at least six months or end of trial (whichever is deemed appropriate given the individual customer circumstances) for removal of the charging point from customers' homes, ensuring that this is done so in accordance with the with IET Code of Practice for the Installation of EV Charging Points. DriveElectric will ensure that the customer's electrical system is left in a safe and secure manner, following the removal.

Once the trials are complete, charging point equipment will be removed from customers' premises, however it will be left in place should a customer choose to retain their equipment, as per the terms of the Service Agreement. The customer will have to accept an ongoing

responsibility for the maintenance of the equipment; this obligation will be communicated to the customer in the Service Agreement.

It is of note that there may be unforeseen circumstances where some or all of the equipment has to be removed, for example if issues are identified with the equipment, the charging cycles, or the installation during the trial.

#### **iv) Charging point failure**

In the event that a customer's smart charging point has failed, with the result that the customer is unable to drive the car due to lack of charge, the DriveElectric will provide a breakdown recovery service to get to a rapid charger and / or alternative transport (taxi or hire car).

#### **v) End of project trials**

At nine, six and two months before the end of the trial period, customers will receive a letter outlining their options for the final stages of the trial. This letter will explain that the trial is coming to an end and they will be given the choice of either retaining the smart charging point, or having it decommissioned.

Regardless of their decision, customers will be contacted a final time by the customer analysis contractor to hold a final post-trial survey and provide the opportunity for feedback on the whole trial experience.

### 3. Priority Services Register customers

**Governance requirement:** the plan must include:

*'Information on the Priority Services Register Customers who will be involved in the Project and how they will be appropriately treated (including providing information to any person acting on behalf of a Priority Services Register Customer in accordance with condition 26 of the Electricity Supply Licence, where applicable).'*

All DNOs maintain a Priority Services Register to ensure the well-being of vulnerable customers<sup>3</sup>.

The project will not specifically target customers on the Priority Services Register (PSR) so any details obtained will be through the process outlined above. However, when/if a customer responds and wishes to participate, they will be asked if they are on the PSR Register. If they do not know but it is likely that they are, they will be checked against the relevant DNO's PSR record to ensure that these customers are contacted and dealt with in an appropriate manner, and in accordance with standard procedures for PSR customers (as outlined in WPD's Code of Practice). For example, appropriate means to communicate will be provided if speech is a problem. As the project team are not explicitly targeting PSR customers for the trial, numbers should be minimal. PSR customers will therefore be treated on a case-by-case basis, with engagement and communication conducted in an appropriate and considered manner for the duration of the trial. As previously noted, if an outage is required, WPD will ensure that the information is in an appropriate format for the PSR customers.

In line with WPD's Code of Practice, where PSR customers are being communicated with, checks will be in place to ensure that the information has been understood and that the customer understands what they are signing up to. In addition, where a person is acting on behalf of a PSR customer under condition 26 of the Electricity Supply Licence, the same information will be provided to that person. We will work with that person on behalf of and with the PSR customer to ensure that all communication is clearly understood and both parties are in full agreement before signing up to a trial.

An example of how we will check that the PSR customer (and the person acting on their behalf, if applicable) understands the information shared with them and what they are committing to is by asking them to explain some of the key information back to us before proceeding with the next steps, i.e. processing their application. Again, as the Project is not explicitly targeting PSR customers, the same approach will be taken in each applicable instance.

The customer's supply will be interrupted for a short period during the installation of the smart charging point equipment at the customer's property; however this equipment will only be installed with the customer's explicit consent at a convenient time. This is the standard procedure for all participating customers. Should any customer be adversely affected by the

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<sup>3</sup> <http://www.westernpower.co.uk/About-us/Priority-Services.aspx>

planned short interruption, for example if essential medical equipment is used at home, and are unable to make alternative arrangements for the planned interruption, they will be classed as unsuitable for the trial and informed by DriveElectric.

As customers will be contacted by DriveElectric to check if their home is eligible for a charging point, this can be used as an opportunity to discuss (discreetly) the impact of the short interruption to customers' power and allow appropriate measures to be taken, for those who are able to make alternative arrangements prior to the planned interruption.

The customer research contractor and DriveElectric will use communication medium appropriate for participating PSR customers throughout the trial. DriveElectric will ensure that the PIV is serviced at suitable times to meet the need of PSR customers.

## 4. Customer consent

**Governance requirement:** the plan must include:

*'Details of how any consents that may be required as part of the Project will be obtained.'*

The CarConnect project is based on customer trials. This includes the use of a customer's internet service for data collection, and mobile telephone for app data transfer. Therefore customer consent is an important aspect of the Customer Engagement Plan. Customers will be required to give full consent to the Project. Customer consent will be explicitly captured in the Customer Consent Form (see Appendix C).

All customers who register interest for the trials will be given a comprehensive information pack covering all the information required (see section 2 (a)(ii)). Before taking part in the trial, all participating customers will be asked to read all information thoroughly and understand the terms and conditions of participating in the trial, sign the trial consent form and return it to DriveElectric.

In addition to the standard terms and conditions for participating in the trials, customers may be asked for their permission to use photographs of them with their PIV, or quotes. If customers decide to give their permission, their photograph will be shown with their first name only, and nearest town/city. These photographs and quotes will be used to promote the project on marketing materials and in any project related reports or other materials.

This document and the Data Protection Strategy outline how customers will be contacted, what data will be collected and how that data will be used and protected. DriveElectric will seek customer consent again should any aspect covered within each of these documents require amending during the trials. This consent must be given prior to any change. Customers will be informed of the required change and asked to sign an amended consent form explicitly documenting the changes.

## 5. Safety information

**Governance requirement:** the plan must include:

*'Details of any safety information that may be relevant to the Project.'*

Customers involved in the trials will receive guidance to ensure their safety, however it is not expected that any activity will pose a significant risk to safety for members of the public or the Project Partners' staff. Installation of the charging point is the activity with the most customer engagement. The key risks and mitigations for this activity are:

- Access issues – such as working in cupboards above head height, unfamiliar or unfriendly animals within the property, exposure to the elements whilst working in externally mounted meter boards. Installers will carry out risk assessments and agree procedures with the customer to ensure everyone's safety
- Installation of charging points to be in accordance with the IET Code of Practice for the Installation of Electric Vehicle Charging Points 4
- Allocated parking space for the PIV and location of the charging point to a safe place for charging to avoid excess trailing leads
- Fully waterproof sockets for safe charging outdoors
- Safe earthing arrangements, particularly with Protective Multiple Earthing (PME), and avoiding excessive earth loop impedance, in accordance with IET code of Practice for the Installation of Electric Vehicle Charging Points and the Wiring Regulations (BS7671)
- Safe use of the charging plug – the PIV charging plugs cannot be used for any other purpose. Customers will be fully briefed on how to safely use the charger
- Identifying and recording charging points – in case of any faults, an asset management plan will be developed to record and monitor the condition and status of charging points to avoid any health and safety hazards.

Appointments will be agreed with the customer in advance to protect and respect customer privacy. All members of staff carry photographic identification and a password can be agreed with the customer prior to the visit to check identity when an appointment is made. Once complete, the installation of equipment will not expose the customer to additional safety risks. Project staff will clearly and politely discuss any temporary onsite arrangement that need to be made during the installation time, these arrangements may include the need to keep the doors closed to keep children and pets away from work activities or other similar measures.

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<sup>4</sup> Developed by ISL Technical Committee 1.1 EV Charging Equipment Installation, *Code of Practice for Electric Vehicle Charging Equipment Installation Second Edition*.

# Appendix A - Management of Customer Complaints, Compliments and Enquiries

## 1. INTRODUCTION

1.1 This procedure sets out the principles that shall be followed when receiving a customer complaint (as defined in appendices B2 and B3) or compliment and ensures that we handle all types of customer contact in a consistent and professional manner.

1.2 A customer, or someone on the customer's behalf, can make a complaint or compliment orally (in person or by telephone) or in writing, including email. If the contact is received prior to 1700 hours on any working day, that shall be the date of receipt. If it is received after 1700 hours on any working day or on a day that is not a working day, it shall be classed as received on the first working day following the day on which it was received.

1.3 Customer complaints and compliments or enquiries regarding this trial can be made directly to DriveElectric or Western Power Distribution.

## 2. RESPONSIBILITY

2.1 It is the responsibility of the business receiving the customer complaint or compliment to ensure that they are logged correctly and promptly in a common electronic database set up for this project by DriveElectric.

2.2 The Project team at DriveElectric shall monitor entries to the database on a regular basis to ensure accuracy and consistency and to enable management reporting.

2.3 DriveElectric will pass details of all complaints, compliments and enquiries to the relevant DNO to all the DNO to carry out their responsibilities as 'The Gas and Electricity (consumer Complaints Handling Standards) Regulations (2008)'.

2.4 If the fault is deemed to be with the vehicle rather than charging equipment, DriveElectric will use best endeavours to provide a replacement vehicle, or work with the appropriate leasing agent to do the same.

## 3. COMPLAINTS

3.1 Upon receipt of the complaint, it shall be determined whether it is a 'new' complaint or an 'existing' complaint.

If it is a 'new' complaint, it shall be uploaded to the Complaint Database, ensuring all relevant details are captured. If it is an 'existing' complaint, the new correspondence shall be clearly linked to the previous complaint and uploaded to the Complaint Database, ensuring all relevant details are captured.

Letters should be date stamped prior to being uploaded.

3.2 Where the complaint cannot be immediately resolved (on the customer call for instance), an appropriate member of the project will make contact with the customer within 1 working day of the

complaint to: (i) acknowledge receipt of the complaint; (ii) make an apology; and (iii) make the customer aware of our Complaints Handling Process and offer to send them a copy of this process.

3.3 Where a complaint is not resolved on the first working day following receipt of that complaint, additional information must be recorded, see Appendix A1 for details.

3.4 Efforts shall then be made, giving consideration to having a face to face meeting, to resolve the complaint within 10 working days from the date of receipt. If the person dealing with the complaint is unable to resolve it within the initial timeframe, it shall be escalated to the appropriate Manager who shall again aim to resolve the complaint within the next 10 working days. If after a further 10 working days and independent review this cannot be resolved, a deadlock letter shall be sent to the customer, again providing them with our Complaints Handling Process for reference.

3.5 A complaint shall only be marked resolved once we have carried out all actions we have agreed to take and the customer is satisfied with the final resolution.

3.6 Should a customer claim to have made a previous complaint, but we are unable to source that complaint, a note shall be made on the new record indicating that no trace of the existing complaint can be found.

3.7 If a complaint has been deemed resolved and a customer indicates that it is not resolved, the existing record shall be reopened and the customer made aware and offered a copy of our Complaints Handling Process. This type of complaint shall be immediately escalated to the next higher level from the complaint manager who had dealt with it last. The complaint shall not be closed until it is demonstrably a resolved complaint.

3.11 When a customer complains about the same or substantially the same issue as has been previously resolved by us within a 12 month period, this shall be logged as a repeat complaint. Reference shall be made to the original complaint number.

#### **4. ENQUIRIES**

4.1 Enquiries shall be handled in a similar manner to complaints. We shall aim to resolve enquiries within 10 working days and these shall be logged on the database to ensure records are maintained.

#### **5. COMPLIMENTS**

5.1 Upon receipt of a compliment it shall be date stamped (if letter) and uploaded to the Complaints Database, ensuring all relevant details are captured.

5.2 The appropriate manager shall be notified and shall inform those staff being commended by the customer within five working days. If applicable, the customer contact shall be shown to the appropriate staff.

5.3 The record shall be closed only when the staff have been informed and managers must be confident all relevant staff have been informed of the compliment.

## **APPENDIX A1 – REQUIRED INFORMATION FOR COMPLAINTS / COMPLIMENTS**

Details required when registering a complaint or compliment:

- The date of receipt of the customer complaint
- If the complaint was made orally (telephone or in person) or in writing (including email and fax)
- The name and contact details of the customer making the complaint or on whose behalf the complaint is made
- A summary of the customer complaint
- A summary of the advice given or action taken or agreed with regard to the complaint. Where actions are taken, we must record the timing of these actions.
- If the customer complaint has been resolved and the basis upon which we consider the complaint to be resolved
- The agreed method for future communication (if any) with the customer

Should the complaint be an existing complaint, the following (in addition to the above) will need to be recorded:

- Whether it is the same complainant making the subsequent complaint and, where different, the name and contact details of the complainant making the subsequent complaint.

Additional details required where a complaint is not resolved by the end of the working day on which it was first received:

- The steps that we have taken following the customer complaint
- The date on which the complaint was resolved
- The date by which we are required to resolve the customer complaint
- The date on which we issued our deadlock letter.

## APPENDIX A2 - DEFINITIONS

The following are definitions adopted by WPD and deemed appropriate for this Project:

Complaint	Means any expression of dissatisfaction made to an organisation, related to any one or more of its products, its services or the manner in which it has dealt with any such expression of dissatisfaction, where a response is either provided by or on behalf of that organisation at the point at which contact is made or a response is explicitly or implicitly required or expected to be provided thereafter
Existing Consumer Complaint	Means a consumer complaint which has been received by the project and whose details have been or should have been recorded by the project

(The Gas and Electricity (consumer Complaints Handling Standards) Regulations, 2008, p2)

Resolved Complaint	A resolved complaint is a consumer complaint in respect of which it is reasonable to conclude that there remains no outstanding action to be taken by the project, because the relevant consumer who made the complaint or on whose behalf the complaint was made (i) has signalled satisfaction with the action already taken; or (ii) has agreed that, whilst he or she may not be satisfied or wholly satisfied by the outcome, the project has taken all action that could reasonably be expected of it in the circumstances; or (iii) has not made further contact with the project within 28 days of despatch by the project of its substantive response to the complaint. [For the avoidance of doubt, in case (iii) the date at which the complaint should be treated as resolved is the date at which the letter was despatched.]
Repeat Complaint	A repeated complaint is where the customer makes contact to express dissatisfaction with the same or substantially the same matter that was the subject of a previously resolved complaint.

(Electricity Distribution Price Control Customer Service Reporting - Regulatory Instructions and Guidance: Version 1, 2010, p11)

## **APPENDIX A3 – COMPLAINT SCENARIOS**

The following scenarios shall be recorded and reported as complaints:

- Where a customer reports discourteous or unhelpful behaviour by project staff
- Where a customer reports a lack of or misleading information about the project
- Where a customer complains about Staff not turning up at appointed times
- A customer complains about equipment damage as a result of a power surge and intends to pursue the matter in the small claims court
- A customer's equipment has been damaged because of a power surge and the customer complains and seeks compensation from the company
- Complaints from MPs, Independent Connections Providers (ICPs), IDNOs (Independent Distribution Network Operators) and other customer representatives
- Complaints about frequent failure of the installed technology and systems leading to undue inconvenience

The following scenarios must not be recorded as a complaint:

- Where a customer calls to report an unplanned loss of supply or failure of the technology
- Where the customer makes contact to pursue a claim under the Guaranteed Standards of Performance (unless expressly complaining at the same time)

The following scenarios must not be reported as resolved complaints:

- Where a course of action has been agreed with the customer but not yet completed
- Where further information or contact from the customer is pending

## **References**

RIIO-ED1 regulatory instructions and guidance: Annex H – Customer Service 1 April 2016

## **APPENDIX B4 –COMPLAINT HANDLING PROCESS**

### **Complaints Handling Process**

If, unfortunately things have gone wrong then you can use the following process to let us know.

#### **How to contact us**

The easiest and quickest way to resolve a complaint is to telephone us on one of the following numbers any time Monday to Friday 8.30 am to 5.00 pm:

DriveElectric 0333 300 1050

Western Power Distribution 0800 055 6833 or email [complaints@westernpower.co.uk](mailto:complaints@westernpower.co.uk)

Alternatively, if you are unable to telephone or would prefer to write, you can contact by post using the addresses detailed below, or by email.

Drive Electric  
Harleyford Marina,  
Henley Road,  
Marlow  
Bucks SL7 2DX

[info@drive-electric.co.uk](mailto:info@drive-electric.co.uk)

#### **Complaint Handling Statement**

Sometimes things can go wrong, so we have produced this Complaint Handling Statement to show what will happen if you have cause to complain to us.

#### **Our Process**

All our staff are trained to offer you the best possible customer service and will do their utmost to help you. If they need to involve their manager, they will do so to ensure the matter is resolved as quickly and easily as possible.

As part of resolving your complaint, we will offer you an explanation and an apology. We will also take remedial action and may award compensation in appropriate circumstances.

#### **Step 1 – Aim to resolve your problem within 10 working days**

When you telephone us with a problem, our staff will attempt to resolve matters with you directly. However, if necessary your complaint will be escalated to an appropriate member of staff or specialist.

If you write to us with a problem, we aim to resolve matters within 10 working days. We may try to contact you by telephone to help with this resolution. However, if we cannot resolve your complaint fully or have not agreed a form of resolution within 10 working days of your first contact, then we will escalate your complaint.

#### **Step 2 – Aim to resolve your problem within the next 10 working days after escalation**

If unresolved, your complaint will be passed to a senior manager who will do everything possible to address your concern and reach a positive conclusion.

If we still cannot resolve your complaint fully or have not agreed a form of resolution within this second 10 working days period, then we will escalate your complaint to the next step.

**Step 3 – Aim to resolve within the next 10 working days after second escalation**

If still unresolved to your satisfaction, we will escalate the matter further to aim to reach a resolution within the next 10 working days.

**Step 4 – Independent Review: Aim to resolve within the next 10 working days**

If your complaint remains unresolved to your satisfaction we shall pass your complaint to an alternative manager for independent review. We will aim to resolve your complaint within the next 10 working days.

## **The Energy Supply Ombudsman**

If you remain unhappy after receiving the response from the alternative manager, you can ask us to 'deadlock' your complaint. This means we will send you a letter which states we have been unable to resolve your complaint to your satisfaction. Once you receive a deadlock letter, you can contact the Energy Supply Ombudsman using the contact details provided below.

You can contact the Energy Ombudsman without a deadlock letter, if we fail to respond to your complaint within the timescales stated in our complaints process. For example, the alternative Head of Business does not respond within 10 days or if 8 weeks have elapsed since you registered your complaint.

Please note that you may be referred back to us if you have not escalated your complaint via our formal complaints process outlined above.

The Ombudsman will carry out an independent investigation on your behalf. Any decision the Ombudsman makes will be binding on our Company, but not on you.

As part of resolving your complaint, the Ombudsman may ask us to make an apology or give an explanation. They can also ask us to take remedial action and may require us to award compensation in appropriate circumstances.

## **The Energy Supply Ombudsman Contact Details**

Telephone – 0845 0550760 or 01925 530263

Textphone – 18001 08450511513 or 18001 01925 430886

Email – [enquiries@energy-ombudsman.org.uk](mailto:enquiries@energy-ombudsman.org.uk)

Website – [www.energy-ombudsman.org.uk](http://www.energy-ombudsman.org.uk)

## **Consumer Direct**

Consumer Direct is part of Trading Standards. Consumer Direct advisers offer independent, impartial advice. If you are a domestic customer, you can contact them at any point regarding your complaint:

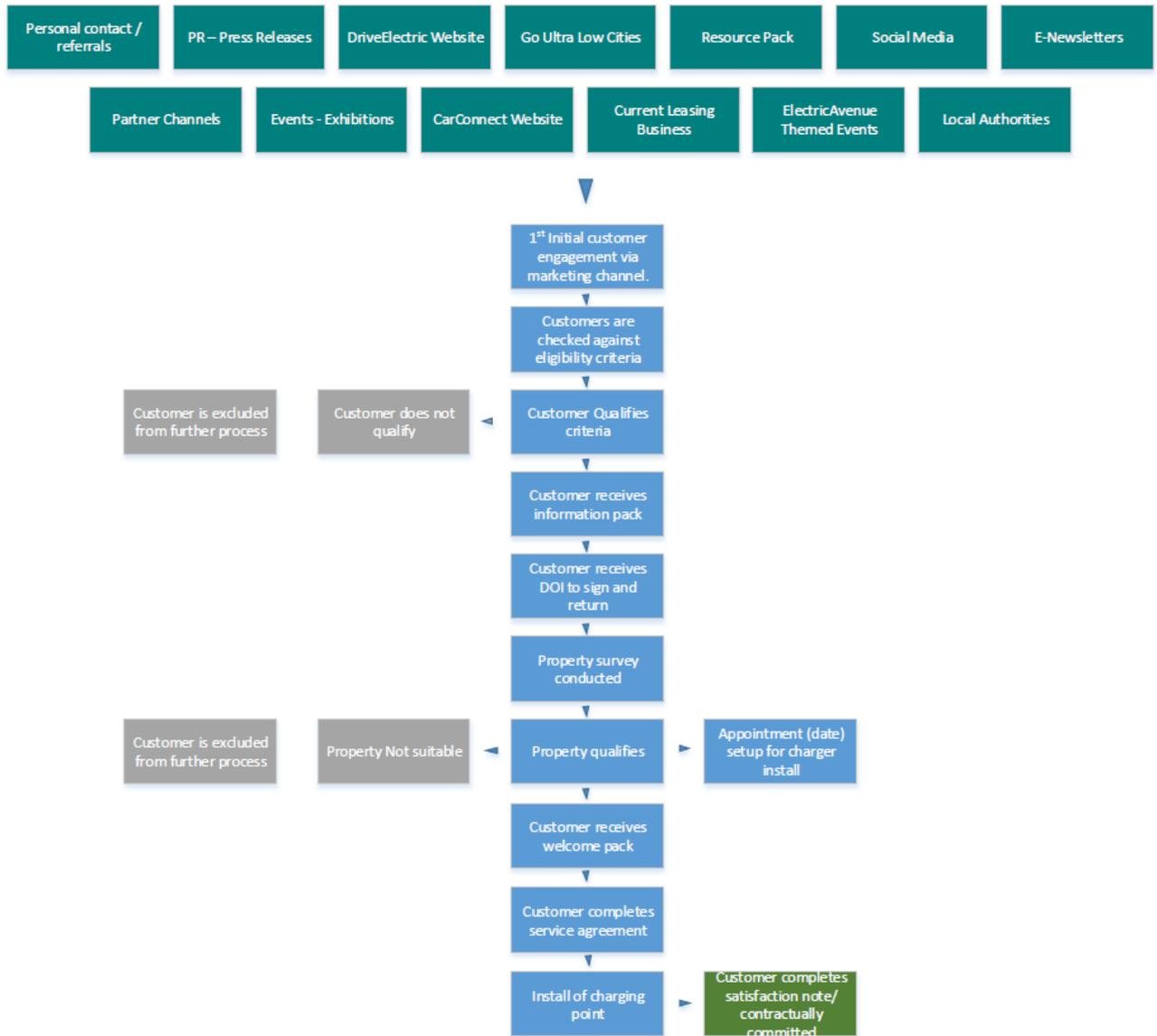
Telephone 08454

040506

Website – [www.consumerdirect.gov.uk](http://www.consumerdirect.gov.uk)

If you are a business customer, you can contact Consumer Direct for basic advice.

## Appendix B – Step-by-step recruitment process



## Appendix C – Customer Consent Form

### Trial Consent Form

### Consent to participate in the CarConnect Trial

**To have an electric vehicle charging point installed, to allow your data to be gathered, and to participate in the CarConnect trial.**

This consent form confirms my commitment to take part in the CarConnect project, that I will participate in associated research, and that I agree to my data being used for the purposes of the CarConnect project. This consent covers:

- Installation of charging point
- Participation in research
- Collection and Use of data
- Use of my data

Please refer to the Customer Engagement Plan and Data Protection Strategy for further detail:

*[link to docs on project website]*

**Main driver:**

<b>Title</b>		<b>House number / name</b>	
<b>Initials</b>		<b>Street/ road name</b>	
<b>Surname</b>		<b>Locality</b>	
<b>Contact number</b>		<b>Town/ City</b>	
<b>Email address</b>		<b>Postcode</b>	
<b>Signed</b>		<b>Date</b>	

Please see overleaf for additional 'regular' drivers to sign.

**Other regular drivers:**

<b>Name</b>		<b>Email address</b>	
		<b>Contact number</b>	
		<b>Date</b>	
<b>Signed</b>			

<b>Name</b>		<b>Email address</b>	
		<b>Contact number</b>	
		<b>Date</b>	
<b>Signed</b>			