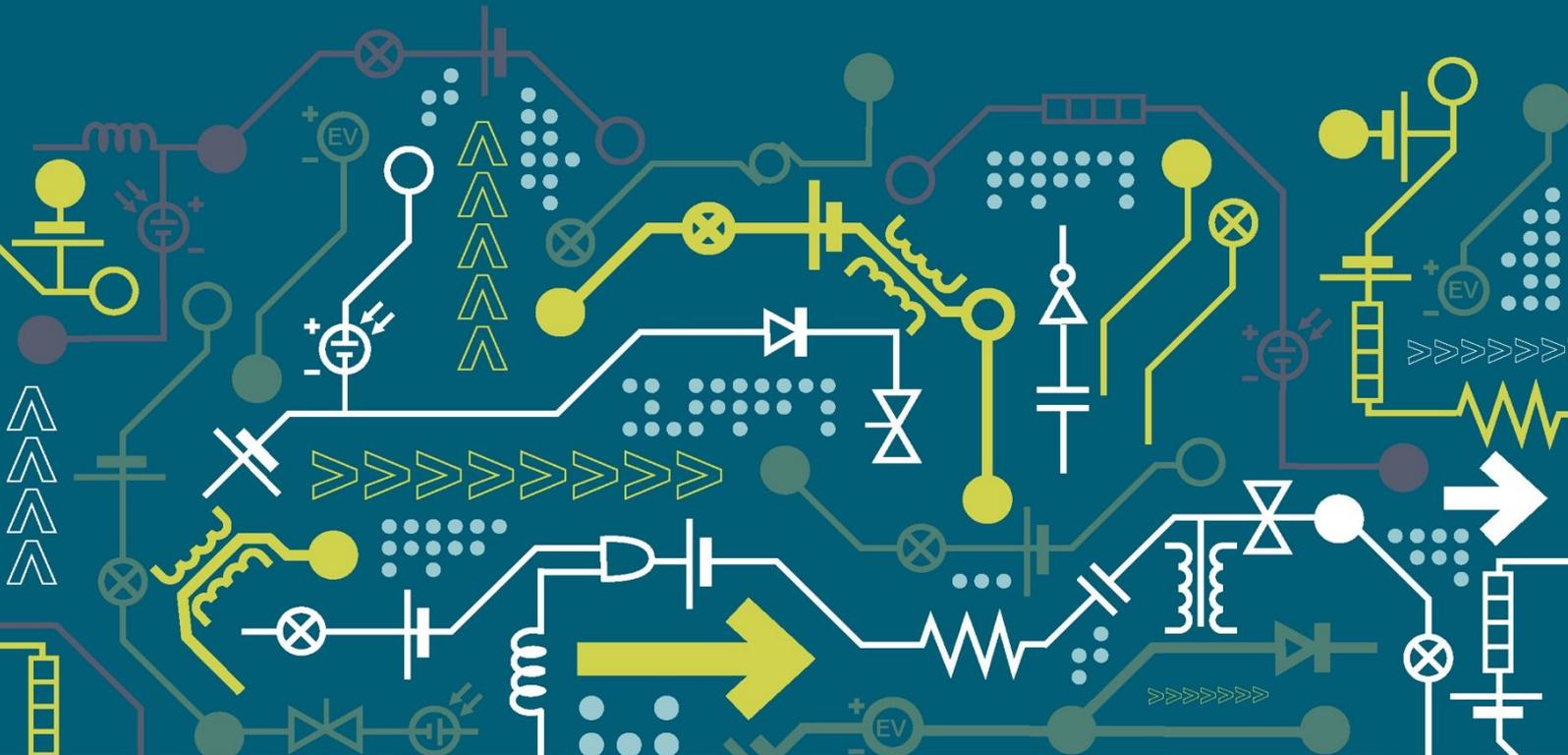


# Electric Nation

PoweredUp

Customer Communications and Engagement Report  
October - December 2020



# Version

# Control

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## Publication Control

Name	Role
Adam Langford	Author
Mike Potter	Reviewer
Ricky Duke	Approver

## Contact Details

### Email

[wpdinnovation@westernpower.co.uk](mailto:wpdinnovation@westernpower.co.uk)

### Postal

Innovation Team  
Western Power Distribution  
Pegasus Business Park  
Herald Way  
Castle Donnington  
Derbyshire  
DE74 2TU

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# 1 Introduction

## 1.1 Electric Nation PoweredUp

This Report details all participant communication and engagement updates for the Electric Nation Vehicle to Grid (Powered Up) project from October 2020 to December 2020. CrowdCharge manage all customer facing activity with some direct customer contact sub-contracted to DriveElectric. This includes recruiting, qualifying, processing, and supporting participants who receive a bi-directional charger as part of the project trial. CrowdCharge are responsible for creating, in collaboration with the on-board energy partners, the End-User Energy Proposition which detail the trialling of reward incentives that V2G services could offer. CrowdCharge are also responsible for managing the project installers, as part of the installation of the associated project hardware i.e., V2G charger and CrowdCharge controller box.

## 2 Customer Engagement

### 2.1 Overview of Customer Engagement

#### 2.1.1 Customer Recruitment

During this quarter, CrowdCharge has continued to promote the project via PR announcements and activity on Social Media, specifically The Projects Twitter account and CrowdCharge's Linked.

The project has received over 550 enquires via the Electric Nation Vehicle to Grid website. This quarter the project has added over 150 new enquires to the project.

The below figures provides an overview of the customer engagement figures the project has received to date, with 556 total enquires as of the 22<sup>nd</sup> December 2020. Out of these, 356 passed the 1<sup>st</sup> stage qualification enquiry form and were entered into the CRM system this allowing the CrowdCharge team to further qualify the participant. 225 enquires have been closed due to either not being eligible, not agreeing to the projects initial terms and conditions or having multiple EVs at their property among other reasons. 131 applications remain open and in process. CrowdCharge anticipate a total enquires figure of 600-700 will be required to achieve the 90-110 installations.

SUMMARY	GRAND TOTAL
DotDigital Enquires (Partial + Complete) / Total Enquires	556
Dynamics Form Responses (Partial + Complete)	556
Dynamics - All opportunities	356
Open Opportunities	131
Lost Opportunities	225

All applicant enquiries for the Electric Nation Vehicle to Grid Project are directed to complete the initial 1<sup>st</sup> stage application form which can be found via a button link on the Electric Nation website homepage. This form also automatically qualifies the customer against basic project criteria.

**ELECTRIC NATION**  
Vehicle to Grid

### Electric Nation Vehicle to Grid Project Application Form

This project application form will qualify if you are eligible to participate in the Electric Nation Vehicle to Grid project and will take approximately 10 minutes or so to complete.

You will need to hand a copy of your full electricity bill dated within the last 3 months and your EV car ownership, lease or order documentation.

**NOTE:** We are not accepting households with more than one EV onto the project at this time (this includes plug-in EVs and plug-in hybrids), or properties which have a stationary battery storage device installed. CrowdCharge are going to look at catering to households with multiple plug-in vehicles in the future, and can confirm this is in the platform development pipeline alongside CrowdCharge battery communication management and development.

You are welcome to still complete the form to register your interest in case any project parameters change in the coming months, or sign up to hear from CrowdCharge about future projects and EV news.

How did you hear about the Electric Nation Vehicle to Grid Project? \*

[ Please select ]

Why are you interested in becoming a participant on the Project? \*

[ Please select ]

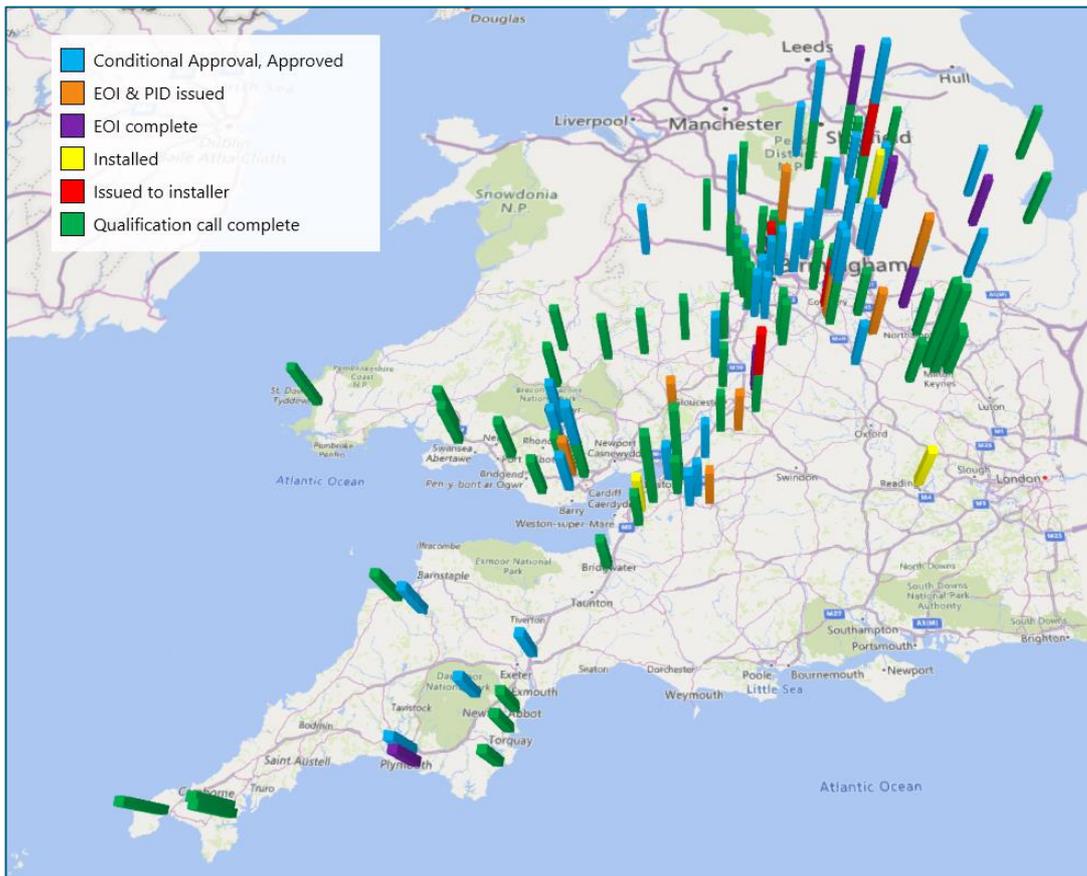
### WPD Postcode Eligibility Checker

The Electric Nation Vehicle to Grid project is recruiting for participants within the [WPD network geographic area](#) only. If you are outside of this area, you will not be eligible to take part in the project at this time.

Please select the rest of your postcode from the list below.

*Electric Nation Vehicle to Grid – project 1<sup>st</sup> stage application form*

CrowdCharge have designed and implemented a detailed recruitment process which associates a recruitment status to reflect the customers progress during the onboarding process. The enquiry enters the CRM system as a new opportunity under the recruitment status 'New Lead'; this is the start of the process.



Map showing spread of project applicants to date; Open Opportunities by Recruitment Status

The engagement team then manually review the application to ensure they are eligible to progress to the next stage of the process, issuing the 'EOI & PID' for the customers initial review and acceptance of the associated project terms and conditions, which they must adhere to to remain on the trial.

Following this the customers complete the EOI web-form and return this to the CRM database securely, thus marking the recruitment status as 'EOI complete'. At this stage, the customer is required to send their electricity bill and vehicle documentation as proof of ownership. Once received, a 'Qualification call' is scheduled with the customer to understand their current charging habits and preferences and to provide a detailed 30-45 minutes overview of the project. This covers the project objectives, what is expected of the customer (i.e project participant parameters) and participant exit fees. During this call it also gives the customer the chance to ask any questions they may have after reviewing the project website, FAQs and Project Information Document.

QUALIFICATION CALL	
Covid-19 Policy	Yes
Security	Yes
Contact Details Confirmed	Yes
Call Recorded?	Yes
Project overview/innovation	Yes
Project timelines	Yes
Project Hardware	Yes
Participant Parameters	Yes
Rewards/Incentives	Yes
Exit fees	Yes
Project Energy Supplier	Yes
Broadband router	TalkTalk
Telematics	Yes
Installation Process/G99	Yes
Typical Plug in time (24hr format)	18:00
Typical plug out time (24hr format)	07:00
Qualification Call Complete	23/09/2020

Qualification call checklist criteria

Upon completing the qualification call, the customers details are passed to the project installer. The installer issues the CrowdCharge home web-survey for them to complete by taking the photos of their property's electrical layout. The installer then reviews the web home-survey and submits a G99 connection request. Assuming these are both approved the opportunity status is then moved to 'Conditional Approval/Approved' and CrowdCharge give the customer

a 'courtesy call', then issue the 'Participant Agreement' which details the projects terms and conditions (similar to what was outlined in the EOI) for their signature.

Once received, the 'PO is issued' to the installer to scheduled the install and the 'installation is scheduled' and 'installed'.

If the customer cancels their application after the PO has been issued, the recruitment status is moved to 'cancelled'.

## 2.1.2 Opportunities lost reasoning

The below table details the reason each opportunity was marked as 'lost'. Out of the 225 lost opportunities, 45 have multiple EVs at their property (the project is technically unable to accommodate multiple EVs at 1 property), with a further 27 on WPDs distribution area border which fall outside of the WPD area. A further 32 applications have been marked as lost due to the applicant not having the correct battery size to be able to participate in V2G – 30kW or larger.

Additional lost reasons categorised and added in this quarter include: Customer withdrew (22), Cancelled: No response (22) and Not Eligible – Stationary battery (7); the project cannot accommodate applicants with a stationary battery installed due to the technical complexities around controlling the battery which falls out of scope of this project. These additional categories were taken from the previously populated other section, which now has reduced to only 2 reasons.

Lost Reason	Lost	Open	(blank)	Grand Total
In Progress		131		131
(blank)				
Cancelled: Additional install cost	1			1
Not Eligible - EV Not Delivered	1			1
Not Eligible - No OSP	1			1
Other	2			2
Cancelled: Exit Fees	3			3
Not Eligible - Lease Expired	3			3
Cancelled: COVID-19 concerns	3			3
Complicated home electrical set up	5			5
Not Eligible - Stationary Battery	7			7
Duplicate Opportunity	14			14
Cancelled: Participant Parameters	16			16
Not Eligible - Primary EV	21			21
Cancelled: No customer response	22			22
Customer withdrew	22			22
Not Eligible - Out of Area	27			27
Not Eligible - EV Battery	32			32
Not Eligible - More than 1 EV	45			45

*Table of 'Lost' opportunity reasons*

## 2.1.3 End-User Propositions

### Flexitricity

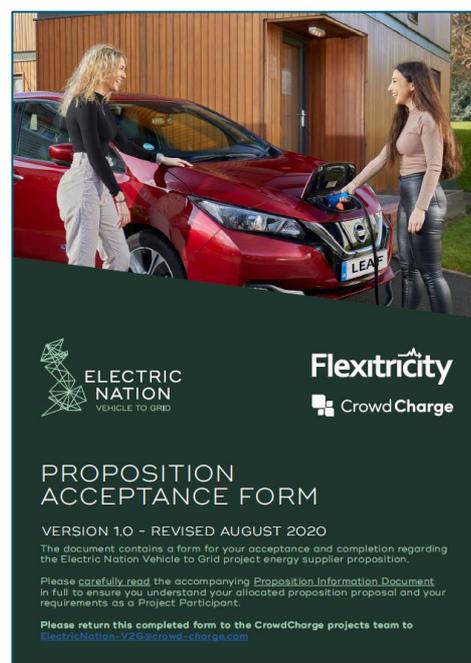
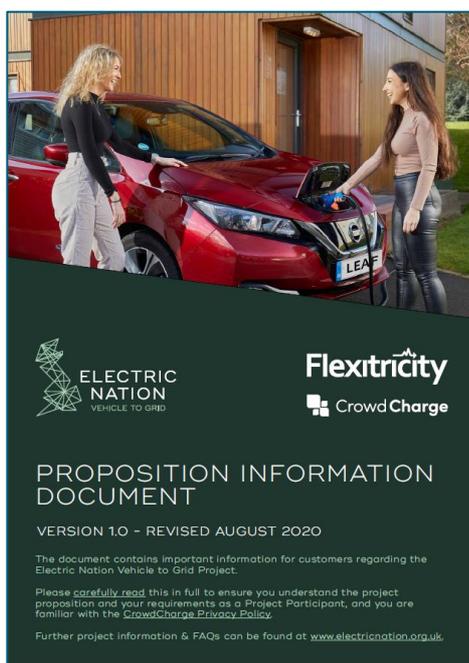
**No Update this quarter – Flexitricity and CrowdCharge End-User Proposition was presented last quarter and all spaces (25) have been accepted by applicants.**

During this quarter CrowdCharge has focused on presenting the onboard energy suppliers/aggregators end-user trial propositions to applicants for their review and acceptance. These end-user proposition documents, which are created in collaboration with CrowdCharge and the respective energy supplier, provides the customer with information on how the 1-year trial operational period energy supplier strategy will affect them and also the participant rewards/incentives that they will be entitled too.

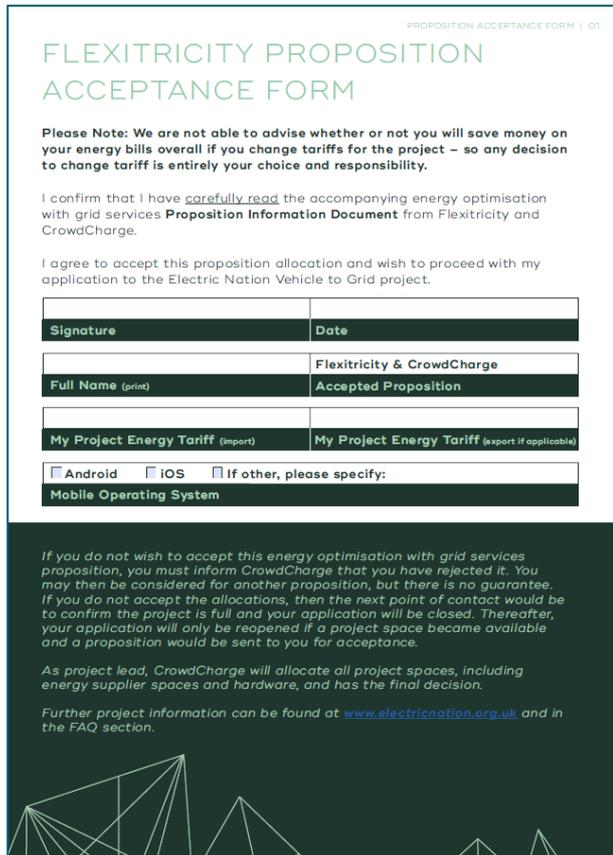
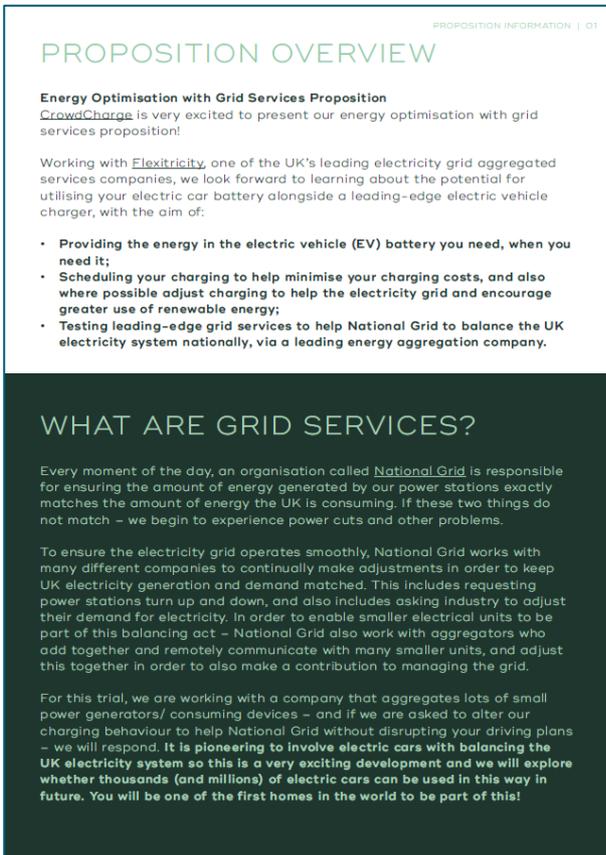
During August 2020, CrowdCharge and Flexitricity agreed the end-user proposition document. The purpose of this document outlines how the 1-year trial operational period will affect customers in respect of their ability to participate in the trial and the level of rewards they can earn which, in Flexitricity case, is dependent on the type of Electricity tariff they are on.

Participants in the group:

- Will be able to earn a reward voucher up to the monetary value of £120 available over the 1-year operational trial period - in return for being plugged in at appropriate frequency/duration and allowing their chargers to be available for grid service events if required;
- Can be included irrespective of the energy supplier or energy tariff they are current on;
  - However, CrowdCharge will prioritise invitations to applicants that are already are set up with Octopus Agile Outgoing, Octopus Agile and Octopus Go tariffs as this allows for the most interesting optimisation strategies via the CrowdCharge demand management platform ultimately saving the customer the most money via shifting charging to low cost and carbon times.
- Will reimburse via the reward voucher scheme in the event that CrowdCharge response to a grid service request from Flexitricity/National Grid to ensure that the participant is not out of pocket (e.g., if we charge/discharge at a time that would be suboptimal from a tariff optimisation perspective);
- With Solar PV installed – CrowdCharge will divert as much excess solar electricity into the EV battery as possible.



*Customer facing PDFs designed and created for the Proposition Information Document and Proposition Acceptance Form*



Flexitricity & CrowdCharge Proposition Information Document: Proposition Overview (left), and Proposition Acceptance Form (right)

An end-user proposition acceptance form was issued alongside the proposition document for the customer to sign and return, confirming they understand what is offered and they agree to proceed with the recruitment progress.

As seen in the table below the *Flexitricity and CrowdCharge proposition* was sent to a group of 26 customers – this proposition group is now full of all 26 accepting the proposition. The *Igloo and CrowdCharge proposition* was presented to c.25 applicants this month with the vast majority accepting (22), and 3 customers declining so will be relocated if possible, to another proposition group.

As part of this end-user proposition acceptance process, if there is no response after 1-week, CrowdCharge follows up with a reminder email. Following a lack of response, a final phone call chase call is made 2-4 days after this follow up email. In the instance a customer does not respond at all, the proposition offer is redacted with the customer awaiting another proposition offer to progress through to the installation qualification phase of the project. These 21 customers have progressed to the installation assessment phase and been assigned to the project installers.

Energy Proposition 1		
Energy Proposition Status 1	Accepted	
Energy Proposition Version/Name 1	Flexitricity and CrowdCharge	
Energy Proposition Sent Date 1	11/09/2020	
Energy Proposition 1 Email Reminder	---	
Energy Proposition 1 Phone Reminder	---	
Energy Proposition Acceptance Form Received 1	12/09/2020	

Energy proposition acceptance process

## Igloo Energy

This quarter, collaboratively CrowdCharge and Igloo Energy have created their End-User Energy Proposition as seen below. This has been sent to applicants which CrowdCharge analysed would be a good fit for the proposition based on the applicant's conversations during the process so far – such as the Qualification call and reason for their interest in the project. This helps to ensure the applicants offered this proposition are more likely to remain on the trial and engaged.

Summary point of this end-user proposition included:

- Trial participants will receive a V2G charger and installation worth approximately £5,500 to use for free for the duration of the trial, up until March 2022;
- The charger ownership can be transferred to you at the end of the project in March 2022 for a transfer fee of just £250;
- Applicants are required to switch their tariff: The **Igloo Pioneer Tariff** will suit participants that would prefer a fixed unit cost 24/7;
- As a reward for switching to this tariff and participating in this group, Igloo Energy will incentivise you through offering **miles of free electricity** available to earn during the one-year trial period;
- Proposition does not include an Export Tariff.

PROPOSITION INFORMATION | 03

### PROPOSITION INFORMATION

**Tariff**

- The **Igloo Pioneer Tariff** is a flat (static/fixe) tariff, meaning the cost of your electricity does not change throughout the day or night so you don't need to worry about when you use energy. It therefore does **not** incorporate the option for time-of-use rates such as Economy 7;

**Rewards**

- As a reward for switching to this tariff and participating in this group, Igloo Energy will incentivise you through offering **free miles of electricity** available to earn during the one-year trial period;
- Meet the minimum requirement of 10 full plug-in cycles\* per month during weekdays from 18:00-05:00 to be eligible for the below Igloo Energy rewards incentive scheme;
- Igloo will reward you with **2 miles of free electricity for every 1 hour your EV is plugged in and available to charge from Monday to Friday 16:00 to 20:00\*\***. And get rewarded with **1 mile of free electricity for every hour your EV is plugged in and available outside of these peak hours;**
- You can achieve a **maximum reward benefit of £12 per month** under this proposition with Igloo Energy Rewards;
- Please note Igloo Energy are assuming an efficiency of 3.33miles/kWh – so you may benefit a little more if you are an efficient EV driver!
- This means in a favourable scenario, you could **earn up to 4,000 free miles of electricity** during the one-year operational trial period;
- See the ['Example Month Calculations'](#) section for more information;

**Charging Schedule**

- For the first few weeks, we will just monitor your basic day-to-day EV charging to get a baseline of your charging patterns before we introduce more complicated auto-scheduling. For this period, you will be able to schedule charging yourself (we will advise you how when your charger is installed). We will let you know when the CrowdCharge auto-scheduling system is going to be activated;

\* A full plug-in cycle is plugging in your EV and leaving it connected to the V2G charger during the hours of 18:00 through to 05:00 the next day, even if charging is not required (specified plug-in duration could change as project develops. CrowdCharge will notify you if it does)

\*\* CrowdCharge has the final say on the time you are plugged in for; this is measured via the CrowdCharge platform. This is unable to be contested by the customer. If your charger is offline, CrowdCharge is unable to verify your plug-in time until the charger communications reconnects to the CrowdCharge platform.

PROPOSITION INFORMATION | 04

### PROPOSITION INFORMATION CONTINUED..

**Export of Energy**

- This proposition does **not** include an export tariff, so we will be avoiding exporting energy from your house. We will however sometimes export energy from the EV battery to reduce the amount of electricity your household is consuming;

**Stationary Battery Storage Device**

- Stationary static batteries will not be accommodated with this project;

**Smart Meter**

- You will not need a smart meter to be able to participate in this group;

**Solar**

- If you have Solar PV panels installed at your property – providing that you inform us before we schedule the V2G charger installation, CrowdCharge configure the installation to aim to absorb as much excess solar as possible into your EV battery (assuming it is plugged-in and the battery is not already full);
- Please note that this feature is currently under development and will be introduced within the early months of the trial.

### WHAT ARE THE IGLOO PIONEER TARIFF ELECTRICITY RATES?

- The Western Power Distribution (WPD) area is split into **four DNO IDs;**

1. East Midlands
2. West Midlands
3. South Wales
4. South West England

- Your **DNO ID** can be found in your MPAN (which is shown on a full copy of your electricity bill (format below);

**S** 01 123 456  
14 6789 0123 222

Igloo Energy and CrowdCharge Proposition Information Document: Proposition Information

Further specific details can be shared of the reward scheme/incentives once all end-user proposition have been confirmed with the other Energy Supplier partners.

Energy Propositions	Accepted	Rejected	Sent	(Blank)	Grand Total
Flexitricity and CrowdCharge	26				26
Igloo Energy and CrowdCharge	22	3	2		27
Pilot				3	3
Blank				75	75
<b>Grand Total</b>	<b>48</b>	<b>3</b>	<b>2</b>	<b>78</b>	<b>131</b>

## Green Energy UK

This quarter, collaboratively CrowdCharge and Green Energy UK have created their End-User Energy Proposition as seen below. This has been finalised in December 2020 and will be issued to applicants in January 2021 which CrowdCharge analysed would be a good fit for the proposition based on the applicants touch points during the process so far – such as the Qualification call and reason for their interest in the project. This helps to ensure the applicants offered this proposition are more likely to remain on the trial and engaged.

Summary points of this end-user proposition included:

- Trial participants will receive a V2G charger and installation worth approximately £5,500 to use for free for the duration of the trial, up until March 2022;
- The charger ownership can be transferred to you at the end of the project in March 2022 for a transfer fee of just £250;
- Customers will be required to switch their electricity provider to **Green Energy UK** and switch tariff to their **Tide Tariff**.
- Green Energy UK will also require you to join their **Time of Use Export Tariff** for the project. CrowdCharge and/or Green Energy UK will be able to give you information on how to switch when required;
- As a reward for switching to this tariff and participating in this group, **Green Energy UK** will incentivise you through offering **free miles of electricity** available to earn during the one-year trial period;
- A SMETs smart meter will be required.

Further specific details can be shared of the reward scheme/incentives once all end-user proposition have been confirmed with the other onboard Energy Suppliers.

## British Gas

CrowdCharge remain in the final stages of contract discussions with Centrica. Once onboarded, end-user proposition discussion will commence.

## 2.2 Overview of Data Protection Management

### No update this quarter

The Data Protection Policy and Privacy Policy were developed and approved by WPD in January 2020. For this project there are a number of partner organisations to pass data between and therefore clear instructions around GDPR and data permissions will be important to maintain. Where possible data is collected and processed digitally and in secure password protected portals and for this project this includes application right through to installed devices.

Since the recruitment launch on the 3<sup>rd</sup> June 2020, the Project has begun to process customers personal details such as name, contact details and electricity supply data via their electricity bill. This data is securely uploaded to a CRM database and company SharePoint which both requires unique usernames and passwords to access. Only the Operations Manager/Data Protection Officer is authorised to apply for user accounts to be created this helping to ensure customers data is only ever accessed by personnel that are required to process it as part day-to-day project activities.

CrowdCharge has begun to process customer personal data (e.g., name, address, contact details, vehicle V5Cs, Lease Agreements etc) through the project enquiry forms. All customer data is stored in a central CRM database, which requires a unique username and password to gain access. These access credentials are only granted via the Operations Manager and Data Protection office.

The project does not record any 'special categories or personal data' as defined by GDPR e.g., race, political opinions, or religious beliefs etc.

If member of the project team are required to share customer information internally or externally due to project related activities, this information is shared via spreadsheet with identifiable personal data removed, instead using a unique identify from the CRM e.g., O-08928. This ensures in the unlikely event that data is shared to the wrong person by mistake, or accessed through a malicious IT attack, the data is unidentifiable to the customers.

No data has been processed by the onboard Energy Suppliers to date. This is anticipated to begin during the next quarter and will be thought about carefully as the electricity supply industry is a highly regulated industry.

## 2.3 Data Risks

This Quarter, CrowdCharge has begun to share personal data such as name, addresses and contact details for participants to the project installers to allow them to assess their properties electrical layout and grid connection possibility. The applicants agree to this transfer of data during their review and acceptance of the EOI terms and conditions.

As the project is now actively recruiting customers and processing their personal data there is, as always, a risk this could be targeted by hackers. Furthermore, there is a risk this data could be purposefully released into the public domain in the event it is stolen or released. Additionally there is a risk in human error that employees could contact customer and pass on other personal details incorrectly.

With these inevitable risks, CrowdCharge has implement various procedures to mitigate these to help ensure the security of customer personal data at all times. These can be viewed in full in the Data Protection Strategy document. A few examples include:

- Customers personal data is stored securely on CRM database and CrowdCharge SharePoint with access only granted via senior members of staff.
  - o Access is only granted via a unique company username and password.

- CrowdCharge does not share personal data via email.
  - o If required to send personal data via email this is complete via a secure method such as a password protected spreadsheet or secure Dropbox link, with the password supplied over the phone opposed to an email in case this is targeted.

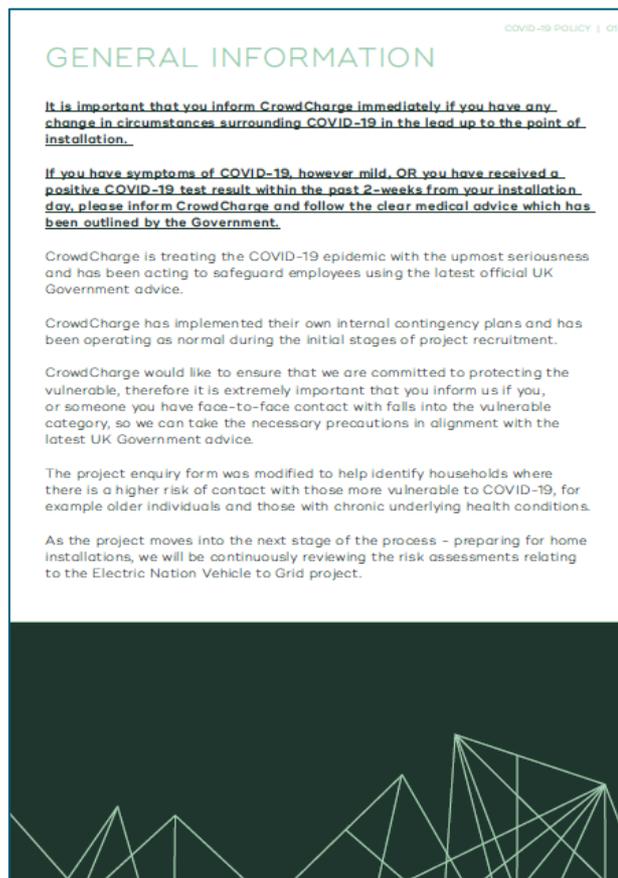
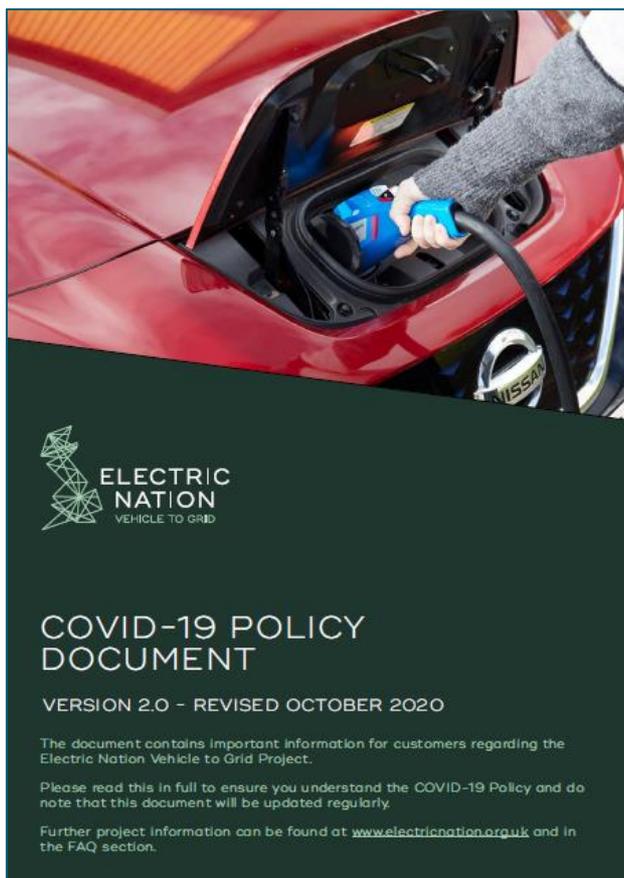
Data management around the interface with supplier partners will be examined as part of the process of recruiting the partners. This is an area to be monitored and evaluated carefully as electricity supply is a highly regulated area.

## 2.4 COVID-19

Along with a comprehensive mitigation plan regarding the possible ramifications of the COVID-19 virus outbreak and associated government action, collateral specific to COVID-19 policy and actions has been produced and prominently highlighted as part of all communications.

The project has a specific COVID-19 policy that is regularly updated in line with the UK Government guidance and WPD instruction. This is accessible via every automated email issued to customers for easy access. It is also accessible via the Electric Nation Vehicle to Grid website. This quarter the policy has been update for the installation phase and subsequently been approved by WPD and all installers.

During this quarter WPD has confirmed it has authorised CrowdCharge and its subcontractors to conduct installation on the condition that the customer has requested a charger to be installed. All installers have been informed that during the installation they are required to abide by social distancing guidelines and the most up-to-date UK Government guidelines. The Project's Covid policy has been updated this quarter in preparation for the installation phase of the project – the current project Covid Policy can be seen below.



The full EN branded COVID-19 policy document is prominent and easily accessible from the Electric Nation V2G homepage of the website

The project COVID-19 Policy is linked in every email transaction that is issued from the CRM database. The policy also is linked on the Project Website.

CrowdCharge will regularly review the UK Government guidance to ensure it is reflected as appropriate within the project.



The full EN branded COVID-19 policy document is prominent and easily accessible from the Electric Nation V2G homepage of the website

## 3 Marketing

### 3.1 Overview

This quarter, CrowdCharge has focused on increasing the number of applications to the project to help ensure the project can meet the recruitment figure of 90-110 chargers installed to satisfy the project milestone. To boost the applicants and to increase the project awareness online, CrowdCharge has created PR pieces in collaboration with external partners, such as the energy suppliers.

The table below details total enquiries with where they were referred from. Family/friend recommendation to project remain one of the strongest methods of marketing available, with google and ZapMap also strong marketing tools to promote the project.

Referred By	Count of Created On
NOT LISTED	78
Google Search	46
Family/Friend Recommendation	33
ZapMap Website	31
DriveElectric Website	25
CrowdCharge Website	17
Nissan Leaf Owners Club - Facebook Group	17
DriveElectric Referral	15
Fully Charged	15
ZapMap Twitter	8
The Energyst media Referral	8
WPD Referral	7
Fully Charged Twitter @FullyChargedShw	7
WPD Twitter @wpduk	5
Autocar UK Website	4
Green Car Guide Twitter @GreenCarGuide	4
CrowdCharge Twitter @CrowdCharge	3
WPD Staff Magazine - Powerlines	3
Energy Live News Website	3
Chargepoint Inc Twitter @ChargePointnet	3
DriveElectric LinkedIn	3
Devon Live media Referral	3
V2G Hub	2
Autocar Twitter @Autocar	2
Bucks & MK Electric Car Club Facebook	2
Nissan UK Twitter @NissanUK	2
DriveElectric Twitter @DriveElectricUK	2
WalesOnline media Referral	1
Flexitricity Twitter @Flexitricity	1
Nissan Dealership - Brindley Nissan (Cannock)	1

<b>Michael Potter LinkedIn</b>	1
<b>Go Ultra Low Twitter @GoUltraLow</b>	1
<b>MK Citizen Website</b>	1
<b>MK Council Website</b>	1
<b>Nottingham Post media Referral</b>	1
<b>Nissan Dealership - J &amp; J Motors (Llanelli)</b>	1
<b>Energy Live News Twitter @EnergyLiveNews</b>	1
<b>Nissan Dealership - West Way Birmingham (Sutton Coldfield)</b>	1
<b>The Times media Referral</b>	1
<b>MK Council E-newsletter</b>	1

### 3.2 Direct Marketing

No update.

### 3.3 Referral Marketing

Dealers - Unlike the previous Electric Nation project referrals from car dealers is restricted to Nissan only as this is the only OEM to manufacture vehicles able to use bi-directional CHAdeMO charging protocols required for V2G. Discussions with Nissan are continuing, and conversations have been had regarding support from Nissan HQ agreeing to issue a newsletter to Nissan Dealers within the WPD district.

Other Automotive – DriveElectric are the UK’s leading pure electric leasing company and have promoted the project though digital channels including the main website which see C 500k visitors a year:

DriveElectric

Vehicles Personal Business Guides News Our story Contact us

## CrowdCharge : Now recruiting for 'Electric Nation' Vehicle to Grid (V2G) trial participants

[Find out more and apply](#)

**CrowdCharge**

DriveElectric's sister company CrowdCharge is recruiting now for new charging trials. If you were a participant in the previous Electric Nation Charging Trial (2016-19) you may have already come across CrowdCharge as its platform was used during the project to provide smart (V1G) charging to help manage demand from EVs. The CrowdCharge app also enables V2G chargers to provide EV owners with cheaper, greener energy and ensures they get the energy they need, when they need it.

**Participants wanted**

If you...

- Drive a Nissan EV with a battery capacity of 30kWh or more
- Live in the Midlands, South West or South Wales

... then you could be eligible to trial a domestic Vehicle to Grid (V2G) smart EV charger worth £5,500.

By plugging in at specified times and putting energy back into the grid you could be rewarded, and the charger can be kept at the end of the trial for just £250.

**About this V2G charging project**

The Electric Nation Vehicle to Grid project is recruiting 100 people to trial state of the art domestic Vehicle to Grid (V2G) Smart Charging in order to help Distribution Network Operators (DNOs) and others to understand how V2G charging could work with their electricity networks. This will allow DNOs to see what V2G looks like as a service, so it can be made available to everyone. By helping to balance variations in the national energy production and consumption, you can save money by buying energy when it is cheaper and greener. The project is effectively imitating the future.

**Project area:**

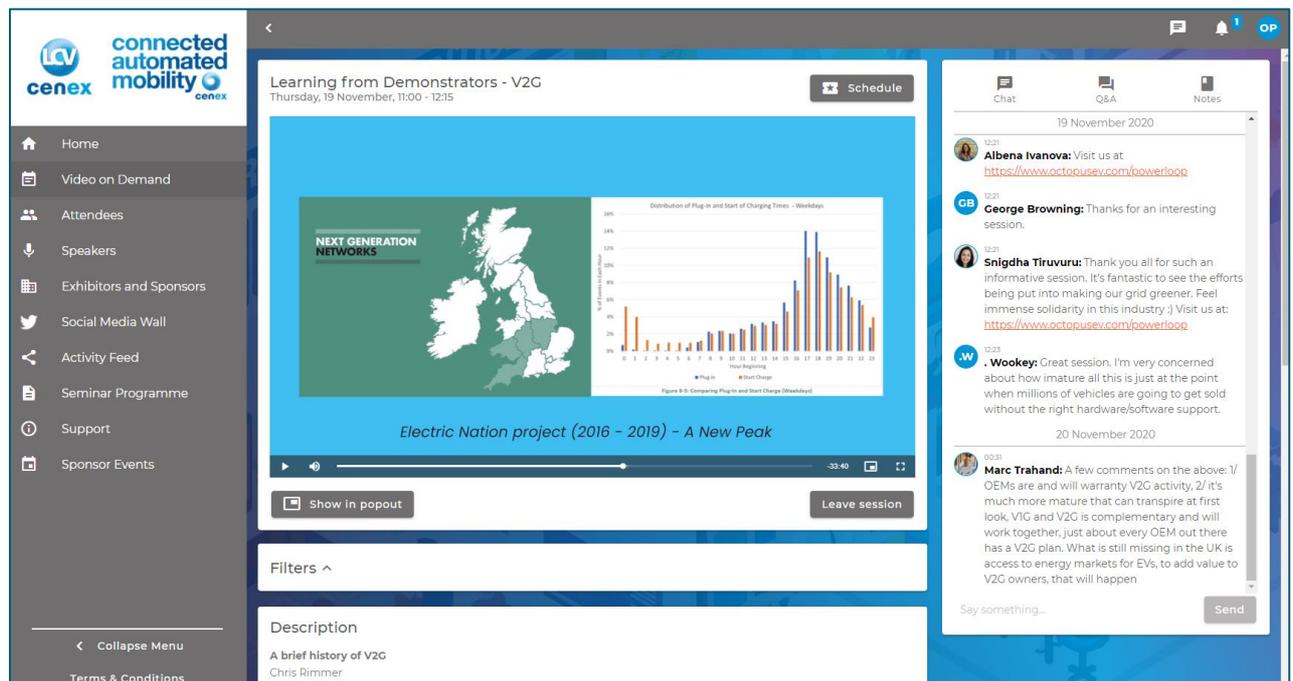
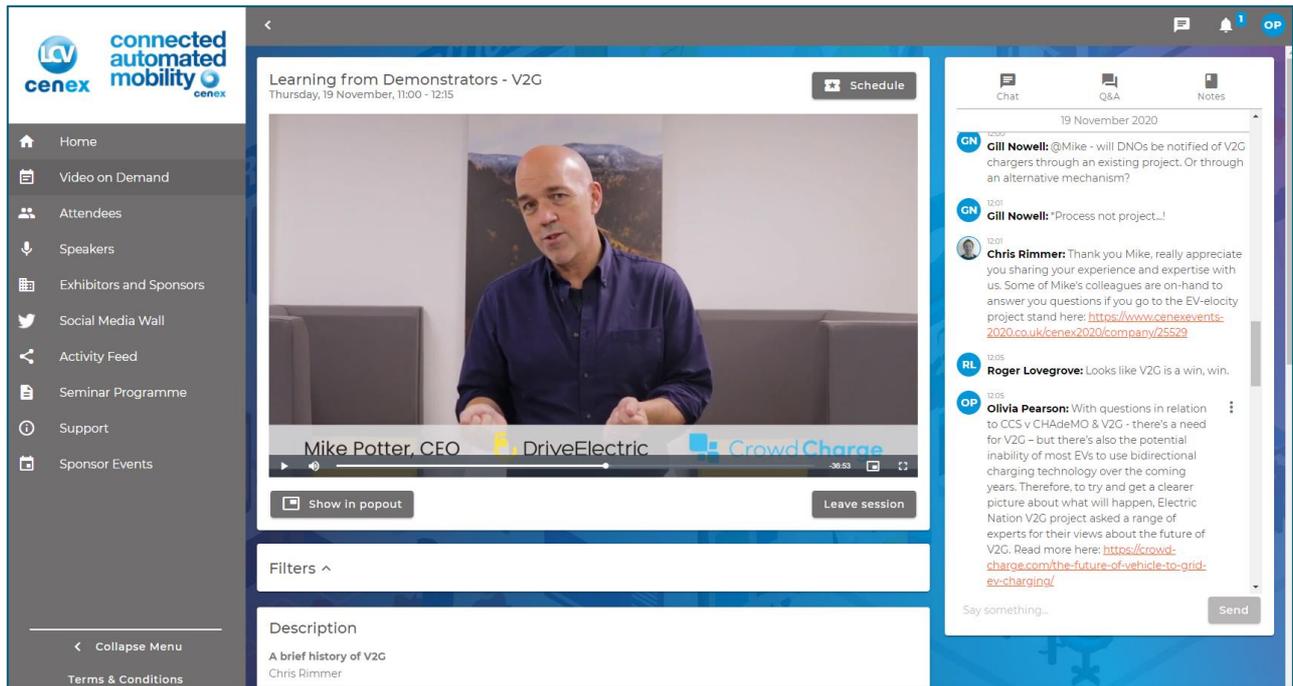
[Check if your postcode is in the project area](#)

[Find out more and apply](#)

DriveElectric website – V2G information referring to Electric Nation V2G project & linking to EN website  
<https://www.drive-electric.co.uk/v2g/>

### 3.4 Events

This quarter CrowdCharge attended the virtual Cenex LCV event the day before PR #7 was scheduled to be shared on the 18<sup>th</sup> November 2020. Mike Potter was a speaker on the subject 'What happens when the streets are full of EVs and V2G?'. The Electric Nation findings from the first project and information on the new Electric Nation Powered Up project were highlighted during the presentation as example cases. With the Electric Nation project (2016-2019) findings offering one solution to the inevitable uptake of EVs and strain on the LV network over the coming years.



Screenshots from CrowdCharge's presentation at Cenex LCV 2020 virtual event

### 3.5 Press and PR Activity

During this quarter CrowdCharge have created and issued X PR pieces to grow the projects profile. The following PR pieces were released:

**PR #5 “ENV2G Trial to partner with Wallbox as V2G Charger Supplier”  
Released: 8<sup>th</sup> October 2020**

This PR piece was created by CrowdCharge and shared with Wallbox and WPD for approval. It detailed that the Project has selected the Quasar V2G charger – the smallest and lightest bidirectional charger for residential use globally and will debut in the UK. CrowdCharge has seen this PR piece promoted on the following websites: Electric Nation, CrowdCharge, WPD, Green Car Guide, Electrive, Marklines (Automotive industry portal), Just Auto, ITS International, Irish Tech News, Electric Vehicle Club.

**PR6: “ENV2G Project announces Flexitricity as first Energy Partner” –  
Released: 20<sup>th</sup> October 2020**

This PR piece was created by CrowdCharge and shared with Flexitricity for input and review before final approval from WPD.



THE ELECTRIC NATION VEHICLE TO GRID (V2G) TRIAL, WHICH IS AIMING TO DEMONSTRATE HOW V2G TECHNOLOGY CAN PROVIDE A SOLUTION TO POTENTIAL ELECTRICITY GRID CAPACITY ISSUES AS THE NUMBERS OF ELECTRIC VEHICLES (EVs) INCREASE, HAS ANNOUNCED THAT IT WILL PARTNER WITH WALLBOX, A LEADING ENERGY MANAGEMENT COMPANY THAT MANUFACTURES SMART EV CHARGING SOLUTIONS.

The trial introduces Wallbox's latest innovation, Quasar, which is the smallest and lightest bidirectional charger for home use. By using Quasar, EVs can put energy back into the grid at peak times, supporting national energy demand. This technology reduces the need for extra electricity generation or network reinforcement.

Electric Nation Vehicle to Grid – a project of Western Power Distribution (WPD), in partnership with CrowdCharge – is recruiting 100 Nissan EV owners in the WPD licence areas of the Midlands, South West and South Wales to take part in the trial of Vehicle to Grid smart charging technology. Currently, only Nissan EVs can be used for V2G charging due to their use of CHAdeMO technology.



THE ELECTRIC NATION VEHICLE TO GRID (V2G) TRIAL, A PROJECT OF WESTERN POWER DISTRIBUTION (WPD) AND CROWDCHARGE THAT WILL DEMONSTRATE HOW ELECTRIC VEHICLES (EVs) CAN PROVIDE V2G SERVICES, HAS ANNOUNCED FLEXITRICITY AS ITS FIRST ENERGY PARTNER.

Flexitricity aggregates lots of distributed power generators as well as sites which consume power, in order to balance the load on the electricity grid. The EVs that are part of the Electric Nation V2G trial will be used to put power back into the electricity grid when required and will be charged during periods of excess supply in the system.



Flexitricity is the pioneer of customer-side flexibility in the GB electricity market, with over 12 years of operational experience. It was the first open-market demand response aggregator in Britain, the first company of its type to enter the GB Capacity Market, and the first electricity supplier to bring business energy customers into the Balancing Mechanism.

The Balancing Mechanism is one of the main tools National Grid ESO uses to balance supply and demand on the electricity system in real-time. Through the Balancing Mechanism, flexibility providers (such as Flexitricity) can offer to increase or decrease electricity generation or demand of their aggregated assets (e.g. connected EV V2G chargers) to adjust power levels to help balance the system. During the initial stages of the Electric Nation Vehicle to Grid project, Flexitricity will be simulating the conditions of the Balancing Mechanism to gather valuable data and explore the potential for EVs to contribute to this important energy system service.

Demand Side Response or Demand Side Flexibility involves participants being financially incentivised to reduce or increase their energy use to provide flexibility to National Grid ESO or Distribution Network Operators (DNOs) as and when they need it. As well as filling in for shortfalls or rapid spikes in national demand, providers taking part in demand side response can also be incentivised to use excess green energy from the grid, for example on a windy day.

Aggregation of assets is the key to unlocking EV flexibility as it allows assets with low

PR5 and PR6 Releases on the Electric Nation Website

## PR #7: “Electric Nation Vehicle to Grid installs its first V2G charger”

Released: 19<sup>th</sup> November 2020

The PR piece was used to promote the project’s first install in Nottingham, with the first participant Rasita Chudasama providing a comment on the installation, along with a WPD and CrowdCharge comment. The piece was also released in line with Government ICE ban for 2030 and included a paragraph commenting on this, so that it could be picked up by more media outlets. This piece was successful in increasing the number of applications to the project; with 74 new enquires added this month – the highest number the project has received to date (apart from the launch month).

The PR #7 piece was picked up by numerous EV news and Energy media online including: CrowdCharge, The Energyst, Zap Map, Electric Cars Report, Garage Wire, Clean Technica, Smart Home Charge, GreenFleet News and The Drive (Australia), Fleet News, Auto Figures, Electric Drives, eHike, Smart Transport, Electric&Hybrid, Advanced Fleet (Spain), Essential Fleet, Wheels in Wales, Newsloft, Electrive, Auto TechInsight.

The screenshot shows the top navigation bar of the Electric Nation Vehicle to Grid website. The header includes the logo, social media icons, a search bar, and a menu with links to HOME, ABOUT, FAQs, RESOURCES, LEARNING, NEWS, and CONTACT. Below the navigation bar, there are two main project categories: \*NEW\* V2G PROJECT (2020-2022) and SMART CHARGING PROJECT (2016-2019). A date indicator shows 19 NOVEMBER 2020. The main headline reads: ELECTRIC NATION VEHICLE TO GRID TRIAL INSTALLS ITS FIRST V2G CHARGER. Below the headline are social media sharing icons for Facebook, Twitter, and LinkedIn. A photograph shows a woman, Rasita Chudasama, standing next to a white Nissan EV at a charging station, holding a blue charging cable. Below the photo is a caption: Electric Nation Vehicle to Grid project first install. The main body of text on the page reads: ELECTRIC NATION VEHICLE TO GRID (V2G) HAS INSTALLED THE FIRST OF 100 V2G CHARGERS, AS PART OF ITS TRIAL TO DEMONSTRATE HOW V2G TECHNOLOGY CAN PROVIDE A SOLUTION TO POTENTIAL ELECTRICITY NETWORK CAPACITY ISSUES AS THE NUMBERS OF ELECTRIC VEHICLES (EVs) INCREASE. OVER 450 EV DRIVERS HAVE APPLIED TO JOIN THE NEW ELECTRIC NATION TRIAL SO FAR. The Electric Nation Vehicle to Grid trial, a project of Western Power Distribution (WPD) and CrowdCharge is recruiting Nissan EV owners in the WPD licence areas of the Midlands, South West and South Wales to take part in the trial of Vehicle to Grid smart charging technology. Currently, only Nissan EVs can be used for V2G charging due to their CHAdeMO technology. The Electric Nation Vehicle to Grid trial is all the more important in light of the Government announcement to end sales of petrol and diesel cars and vans by 2030, meaning that there will be a more rapid take-up of electric vehicles over the next ten years. The trial is using the Wallbox Quasar, the smallest and lightest bidirectional charger for home use. By using a vehicle to grid charger, EVs can put energy back into the grid at peak times. This technology reduces the need for extra electricity generation or network reinforcement. Rasita Chudasama is the first Electric Nation Vehicle to Grid trial participant to have a charger installed, which happened at the end of October. Rasita says "I'm delighted to be part of the Electric Nation Vehicle to Grid project and to play a role in trialling this exciting new technology. By reducing the potential impact of EV charging on electricity networks, V2G should support the rapid uptake of electric vehicles, which will help us to improve local air quality and combat climate change. I'm looking forward to seeing how V2G works from an EV driver's point of view." The V2G trial follows the first Electric Nation project from 2018/19 which at the time was the world's largest EV smart charging trial. The trial captured data from more than two million hours of car charging, providing real life insight into people's habits when charging their vehicles. The Electric Nation Vehicle to Grid trial is offering free installation of the V2G smart chargers worth £5,500 to Nissan EV drivers who live in the WPD regions. CrowdCharge is recruiting 100 people for the trial to help Distribution Network Operators (DNOs) and others to understand how V2G charging could work with their electricity networks. Electric Nation Vehicle to Grid is the first V2G project to use multiple energy suppliers instead of just one. This means that the trial is a more realistic simulation of a future world in which many streets will have a number of EVs using V2G chargers operated by different energy suppliers. Flexitricity has recently been announced as the project's first energy partner, with up to four more to follow. During the one-year trial each supplier will use the V2G chargers to test their various energy services, such as using the EVs that are part of the Electric Nation trial to put power back into the electricity grid when required, and charging the EVs during periods of excess supply in the system. All the suppliers will use CrowdCharge's demand management charger platform, which provides optimised charging sessions to ensure that the customer's vehicle will be charged at the cheapest rate whilst being ready when needed. Mike Potter, CEO of CrowdCharge, comments: "Vehicle to grid charging is a great concept, but it hasn't yet been trialled sufficiently on Britain's electricity networks to enable it to be rolled out on a country-wide basis – hence the need for this project. This trial will provide a smart solution for the management of electric vehicle charging and will study the real-world benefits of V2G." By plugging in at specified times and putting energy back into the grid, active participants of the Electric Nation Vehicle to Grid project are expected to earn a minimum reward up to the monetary value of £120, available over the one-year trial period from March 2021 to March 2022.

PR7 release on the Electric Nation Website

Throughout November and December, CrowdCharge has drafted a further 2 PR piece with the remaining onboarded Energy Suppliers. These pieces were approved in late December and are scheduled to be released in early-Jan to provide a final boost to recruitment figures before the project looks to close applications.

## PR #8: “Green Energy UK – Energy Partner #2 announced”

Release: Early-Jan 2021

- CrowdCharge and GEUK have approved final version beginning of December. This was approved by WPD in late December and is now ready to schedule.

## PR #9: “Igloo Energy – Energy Partner #3 announced”

Release: Early-Mid Jan 2021

- CrowdCharge and Igloo Energy have approved final version beginning of December. This was approved by WPD in late December and is now ready to schedule.

CrowdCharge have also started drafting the final PR energy partner announcement for the project to help promote the project, demonstrate project progress to industry, and aid the final recruitment push in late-January 2021:

## PR #10: “British Gas – Energy Partner #4 announced”

Release: End-Jan 2021

- CrowdCharge has begun to draft this PR piece, in preparation to share with British Gas for their input once they have confirmed their reward criteria, and then will be shared with WPD for any comments and final approval in the New Year.

### 3.6 Website

No update this quarter – recruitment remains open

The screenshot shows the Nissan EV Drivers website homepage for the Vehicle to Grid trial. The main heading is "NISSAN EV DRIVERS INVITED TO TAKE PART IN VEHICLE TO GRID TRIAL". Below this, there is a "COVID-19 UPDATE" section with a link to the full policy document. The page lists eligibility criteria: driving a Nissan EV with a battery capacity of 30kWh or more, and living in the Midlands, South West, or South Wales. It also mentions a reward of £250 for plugging in at specified times. A prominent "APPLY NOW" button is visible. At the bottom, a "RECRUITMENT PROCESS" section outlines six steps: 1. Complete the application form; 2. Project installer issues a V2G charger web survey; 3. Installer and Western Power Distribution assess the application; 4. Installation day is booked; 5. Installation is complete; 6. Official start of the trial is in March 2021.

*Electric Nation Vehicle to Grid website homepage – refreshed for 2020 project launch*

### 3.7 Social Media

Since the Projects twitter account was unsuspended, CrowdCharge has regularly used Twitter has been to retweet associated Low Carbon and Green Energy News pieces. CrowdCharge has also pinned a tweet, stating that onboarded Project Energy Suppliers will be announced soon. The messaging regarding recruitment have also been that applications to the project will be closing soon.

**Electric Nation**  
@ElectricNation\_

Electric Nation is the World's largest #ElectricVehicle domestic smart charging trial, here in the ❤️ of the UK. Now trialling #VehicletoGrid ⚡

[electricnation.org.uk](http://electricnation.org.uk) 📅 Joined August 2016

1,306 Following 2,902 Followers

Tweets Tweets & replies Media Likes

Pinned Tweet

**Electric Nation**  
@ElectricNation\_

The @ElectricNation\_ #V2G project will shortly be announcing NEW onboarded energy partners, so watch this space! ⚡👁️

Applications will soon be closing to the project, so if you...

- ✓ Live in the @wpduk area
- ✓ Drive an eligible Nissan EV
- ✓ Have OSP

👉 Apply @ [electricnation.org.uk](http://electricnation.org.uk)

12:05 PM · Dec 1, 2020 · Hootsuite Inc.

||| View Tweet activity

6 Retweets 3 Quote Tweets 15 Likes

**Electric Nation**  
@ElectricNation\_

Electric Nation is the World's largest #ElectricVehicle domestic smart charging trial, here in the ❤️ of the UK. Now trialling #VehicletoGrid ⚡

[electricnation.org.uk](http://electricnation.org.uk) 📅 Joined August 2016

1,306 Following 2,902 Followers

Tweets Tweets & replies Media Likes

Pinned Tweet

**Electric Nation**  
@ElectricNation\_

We have installed the FIRST project #V2G charger! 🚗  
⚡🔌📄 [bit.ly/2KoffDV](https://bit.ly/2KoffDV)

This V2G trial is all the more important in light of the Gov't announcement to end sales of ICE vehicles by 2030, as there will be a more rapid take-up of #ElectricVehicles over the next 10 years 📈

1:55 PM · Nov 19, 2020 · Hootsuite Inc.

||| View Tweet activity

4 Retweets 1 Quote Tweet 20 Likes

*Electric Nation pinned tweets for PR #7 for November and December 2020*

LinkedIn is also used regularly to promote the project through CrowdCharge and the Electric Nation – EV trials group (which was set up for the first Electric Nation project). Posts are also picked up by companies and professionals in this networking channel.

CrowdCharge and Electric Nation – EV trials group: PR7 posts

Shared posts on LinkedIn for PR7

### 3.8 CrowdCharge Newsletter

There was a CrowdCharge November update newsletter sent to the Project applicants during this quarter to update them on the Project progress and make them aware of any next steps required. This engagement is key to keep applicants up to date with the project's progress and any updates.



**Electric Nation Vehicle to Grid**  
**First project install complete!**

© Electric Nation Vehicle to Grid - First project install completed end of October 2020

CrowdCharge were very pleased to finally get the first project charger installed at the end of October! As project applicants; we wanted you to hear it here first and will be sharing the news and more details publicly over the next couple of weeks - yay!

However, due to current climate & the next steps involved with installer and DNO (G99 application) approvals - it is likely that if you are offered a proposition for acceptance and were approved by the project installer and DNO then your install will likely take place **from December 2020**. These will be done in batches through to February 2021. *The charger install and project timelines are all subject to COVID-19 delays.*

At this time, this should *not* impact on the trial start date & we are still working on getting the remaining TWO (out of FOUR) energy partner Propositions finalised and sent to selected applicants to continue their application process up until installation.

We will endeavour to keep all qualified applicants upto date with any change to the Project timelines. Please also familiarise yourself with the updated *Project COVID-19 Policy - Version 2.0* updated October 2020 [here](#).

**COVID-19 Policy updated October 2020 - Please read here**

#### Electric Nation Vehicle to Grid applications: What's next Adam ?



The Electric Nation Vehicle to Grid project has had over 450 applications to date (and counting!) since launching in June earlier this year.

What a fantastic response - thank you!

#### Energy Partner Propositions:

- The **FIRST** proposition group (for which the Project's first energy partner has been announced as **Flextricity**) has been initially filled with 25 out of 25 applicants accepting a place to date. We do have first and second reserve applicants in line for this proposition as these initial acceptances are still pending home electrical survey and DNO approvals.
- We have just sent the **SECOND** proposition to initial selected applicants so are awaiting confirmation of proposition acceptance numbers and then will be progressing these applicants through to the project installer web-home survey. We will be looking to announce this energy partner officially during this month.
- We're working with our **THIRD** energy partner on the proposition document and we hope to get this agreed & sent to selected applicants by the end of November. We will be looking to announce this energy partner officially during this month.
- We are awaiting the energy partner agreement to be signed with our **FOURTH** energy partner, but then should be able to begin work on this proposition document shortly.

So, if you *haven't* already been sent a proposition to date to accept and progress your project application - *don't panic* - this doesn't necessarily mean that your application is not going to be progressed, as we are still working on the final two propositions which may be more suitable for your circumstances!\*



© Flextricity - Control Room

*November newsletter – project applicant progress update to qualified applicants*

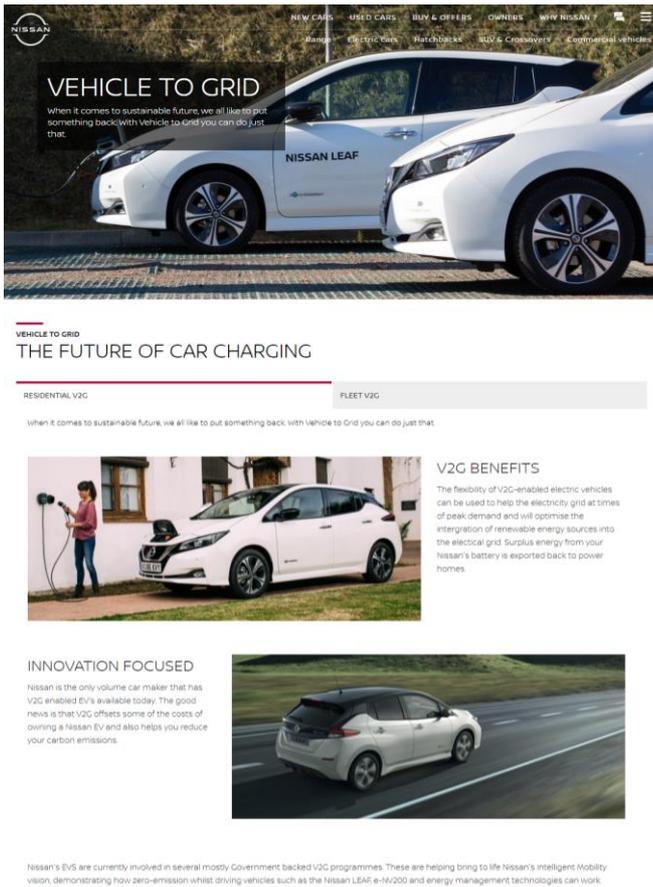
### 3.9 Advertising / Bought Media

There are no plans to utilise any bought media or advertising at present however CrowdCharge may utilise Google AdWords if required to increase recruitment figures.

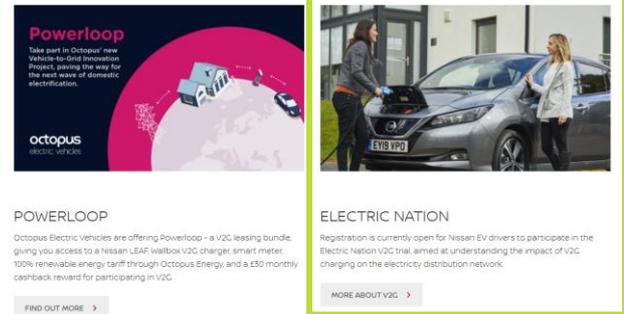
CrowdCharge have not used any bought media or advertising during this quarter.

### 3.9.1 Nissan UK

During December, following numerous conversations with Nissan UK, Nissan have detailed the Electric Nation V2G project on their Vehicle-to-Grid website, linking to the Projects Homepage, along with the other major V2G trials in the UK – Powerloop and Project Sciurus. Viewable here:



Nissan's EVs are currently involved in several mostly Government backed V2G programmes. These are helping bring to life Nissan's Intelligent Mobility vision demonstrating how zero-emission whilst driving vehicles such as the Nissan LEAF e-Nav200 and energy management technologies can work together to create cleaner, more efficient energy.



*Nissan website Vehicle to Grid information; including the Electric Nation V2G project*  
<https://www.nissan.co.uk/range/electric-cars/v2g.html>

Nissan UK have also stated they are able to produce an internal newsletter to share with their Dealership's within the WPD area to promote the project to customers purchasing or leasing a new Nissan EV. CrowdCharge have not pursued this marketing method yet.

### 3.10 Energy Partner Activity

CrowdCharge has signed collaboration agreements to provide energy services for the 1-year operational period with Green Energy, Flexitricity and Igloo Energy. CrowdCharge are in final discussion with 1 remaining energy suppliers who are in the final stages of contractual discussions.

CrowdCharge have created PR pieces to announce the respective Energy Partner joining the project, as detailed in section 3.5 above.

## 4 Customer Application and Installation Process

To make the process as efficient as possible and to fall in with current trends for customer digital self-service, a comprehensive online application form has been developed that feeds directly into a customised Microsoft CRM system. Utilising the Microsoft system brings with it a comprehensive data protection platform with many inbuilt policies and features to ensure a very high level of data security.

### 4.1 Customer recruitment process

This quarter CrowdCharge has continued to process applications to the project which are received through the detailed project enquiry form which pre-qualifies the customers eligibility to join the project e.g. off street parking, reside in WPD district and owns/lease a Nissan Leaf etc.

The engagement and recruitment team have focused on 1) processing applications throughout this quarter from 'New lead' received up to 'qualification call complete', as seen below, and 2) progressing applications which have been passed the installer for Survey Approval and Survey + G99 approval as this process requires more administration work to keep the applications moving.

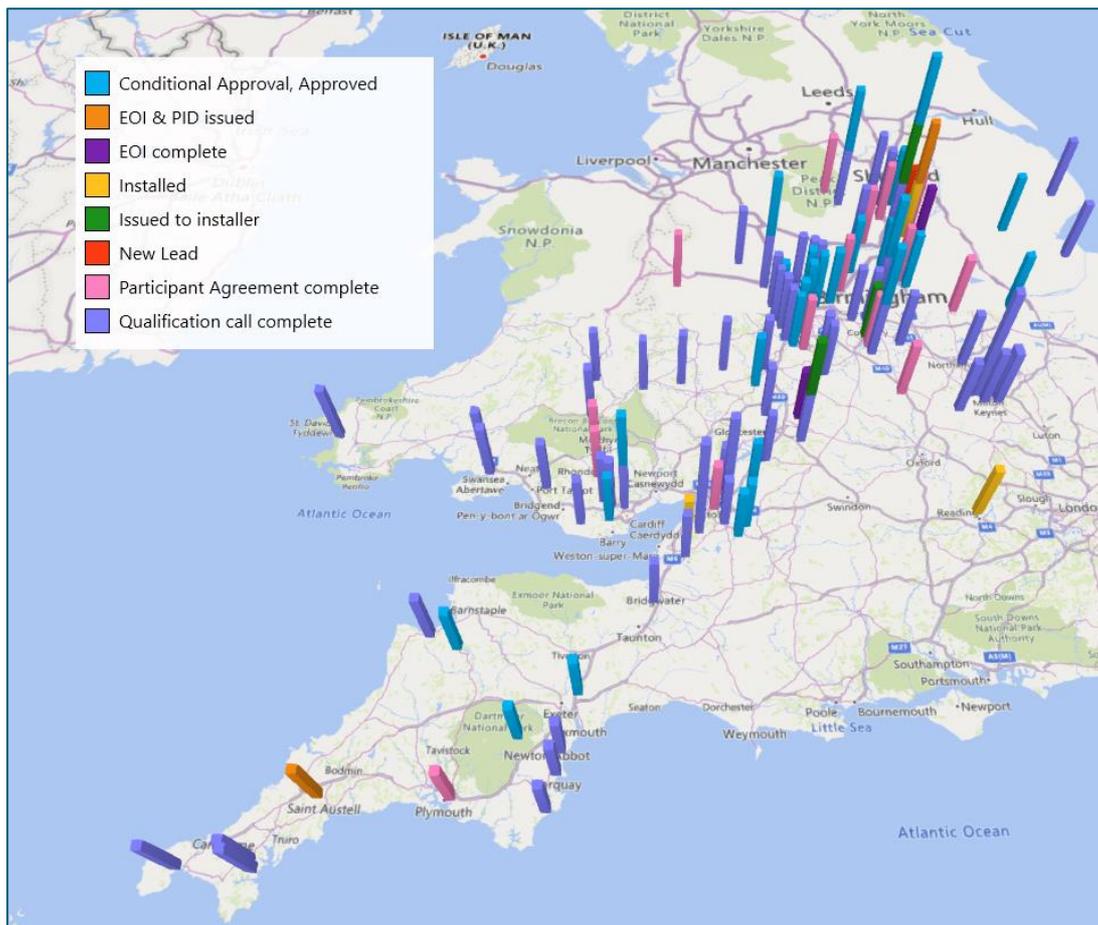
CrowdCharge has designed a detailed recruitment process for applicants, via a project enquiry form which pre-qualifies applicants before passing them through to the live CRM system. This streamlines the engagement process for applicants to not waste their time, and also for the engagement team to allow for increased productivity. Enquires are received into the Dynamics system as a 'New Lead' and then reviewed by a member of the team to ensure they meet the project eligibility requirements. Assuming they do, they are issued an 'Expression of Interest (EOI) form and Project Information Document (PID)' for them to review and complete. If they do not pass the teams review, their application is mark as lost, and informed by email.

Following the return of the 'EOI form complete', a number of associated documents are requested from the customer such as EV proof documentation and electricity bill to confirm their MPAN. Once these documents have been received and approved for use in project by the engagement team, a 'Qualification Call' is scheduled with the customer within 5 days of receiving their complete documentation. Following this, CrowdCharge allocated the customers to an energy supplier group and present the end-user proposition to them for review and acceptance. Upon their acceptance the customer details are transferred to the installer to begin assessing the electrical layout of the property and submit to WPD a G99 connection request. Once approved, CrowdCharge completes a courtesy call with the applicant as they have been with the installer for a number of weeks or months. This call is to check they are happy so far and to update them on project timeline and nexts steps. Following this CrowdCharge issues a PA agreement with details terms and conditions for acceptance into the trial for the customer to review. Once returned the installation day will be scheduled by the installer.

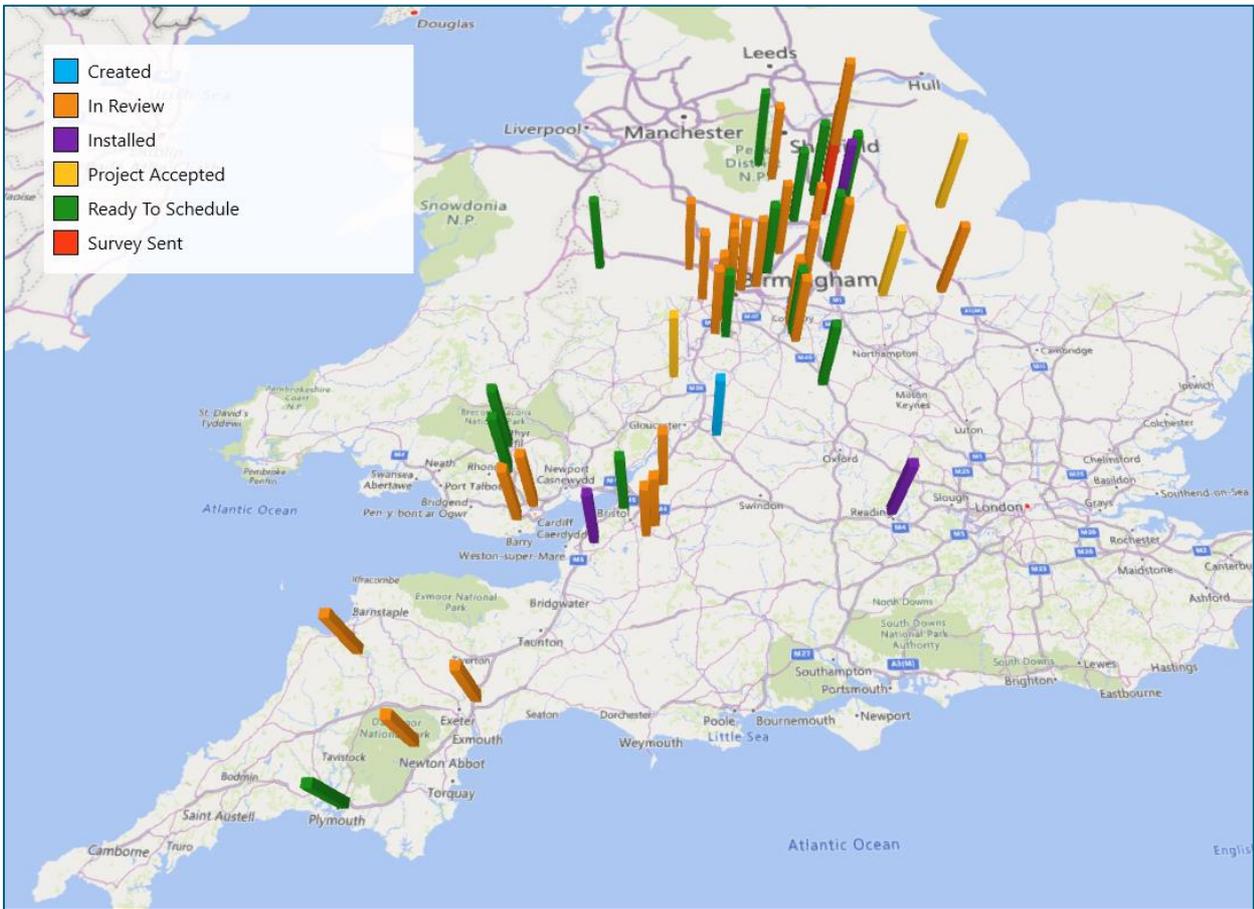
The below table details the recruitment journey as described above status of total opportunities in the onboarding process.

Recruitment Status	Lost	Open	Grand Total
New Lead	123	0	123
EOI & PID issued	66	8	74
Qualification call complete	24	6	30
EOI complete	24	6	30
Issued to installer	0	5	5
Conditional Approval, Approved (Survey)	0	43	43
Survey Approval + G99 Approval	0	19	19
Participant Agreement Issued	0	0	0
Participant Agreement Complete	0	0	0
PO Issued	0	0	0
Install Date scheduled	0	0	0
Installed	0	3	3
Cancelled	0	0	0

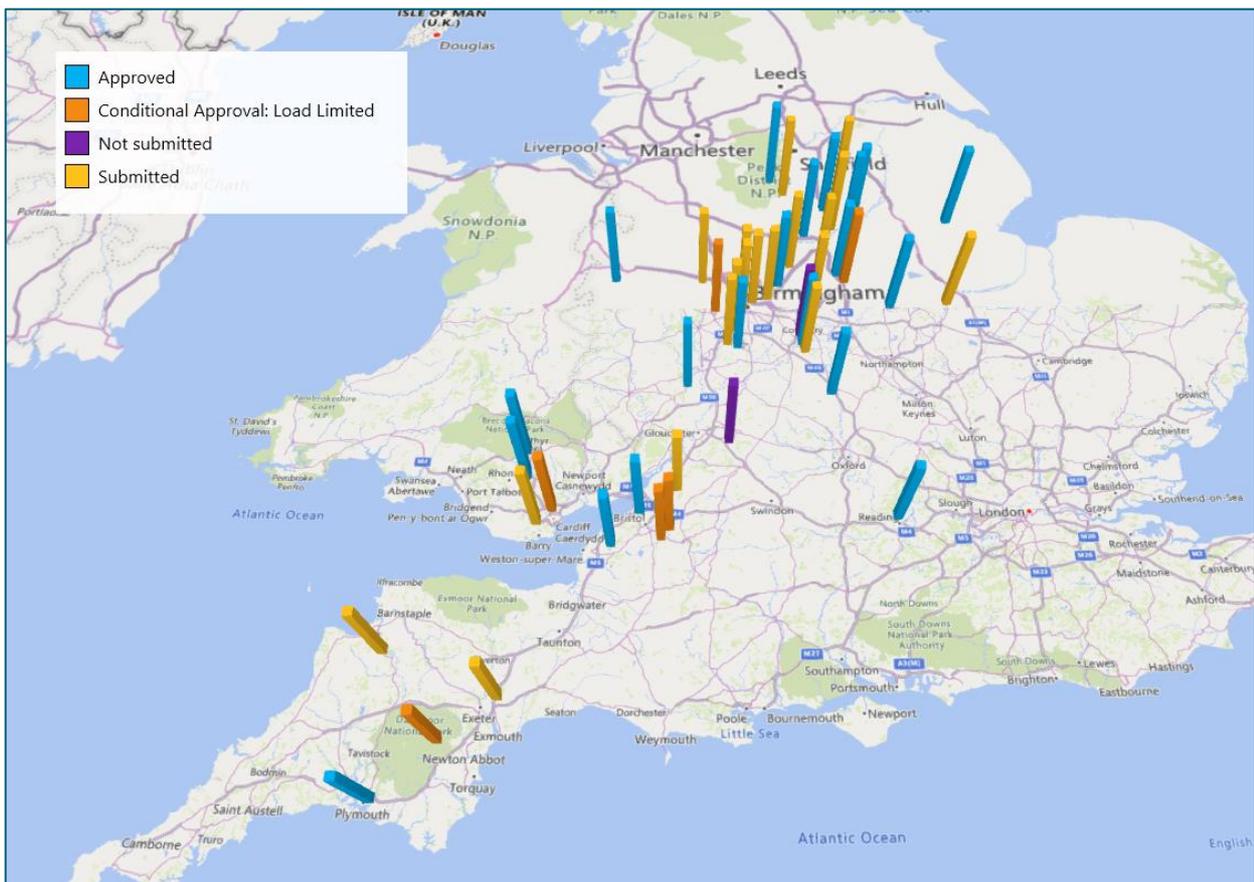
The key figures within this table are the number of Qualification Calls complete, and also the Survey Approval + G99 Approval. The former is key to understand the quantity of customers which are in the pipeline and wanting to proceed with the trial after understanding more about their participant requirement and obligations. The latter is key to ensure the project hit the recruitment target of between 90-110 installations.



Recruitment status by project install location (From data on 04/01/2021)



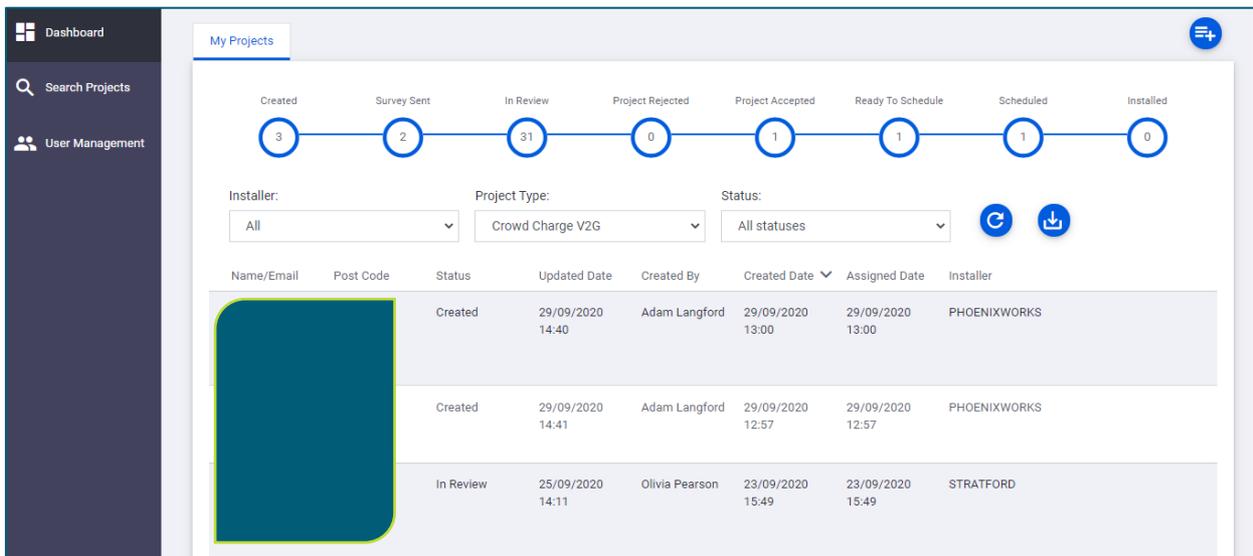
Install status by project install location (From data on 04/01/2021)



G99 status by project install location (From data on 04/01/2021)

## 4.2 Installation Process

This quarter, CrowdCharge began to pass the project installers customers applications via the survey web portal. The install process is handled via a third-party online platform that allows the customer to complete a digital survey including capture and upload of required pictures around the property where installation will take place including consumer unit, location for charger, incoming fuse, meter etc. This process enables a more comprehensive remote desktop survey to be completed by the installer leading to approval for the work to go ahead withing budget. The survey will also collect details for the MPAN and other important information. The progress of booking for installation is updated via the portal by the installer allowing the CrowdCharge to have access to all information regarding the installation progress. The customer is updated by email and text in branded format throughout the process and invoicing and purchase order processes are also covered.



*Jumptech portal dashboard*

A major part of the surveying process for prospective participants is the G99 approval. The installers will submit G99 requests on behalf of applicants to WPD before they approve an application and schedule the charger installation.

This quarter CrowdCharge have also confirmed the CrowdCharge Atom App which the onsite installer using on the installation day as pre-install, post install and commissioning checklist. The app will be used by CrowdCharge to retrieve installation day data, such as V2G charger and CrowdCharge controller serial number, to automatically enter this into the project's CRM database. This remove the ability for human error in entering the Serial number in the database. Photos of this detail are requested too.

## 4.3 Courtesy Call Process

This quarter CrowdCharge has completed a number of courtesy calls with customers which have had their survey and G99 application approved. The purpose of this call is to ensure the customer is happy with the process so far, and for CrowdCharge to explain the updated project timelines and the next steps in the process.

The below images show the project script which the recruitment and engagement team use for each applicant to help ensure high levels of customer's service.

CHECK LIST

**Electric Nation Powered Up - Project guide for calls**

This is a rough template to use when calling participants at different stages and circumstances. Please utilize these documents during the calls.

- Expression of Interest ([EOI T&C](#))
- Project Information Document ([PID T&C](#))
- Participant Agreement ([PA T&C](#))
- Telematics document ([Telematics T&C](#))
- COVID-19 Policy ([COVID-19](#))
- FINAL Questions and Answers ([Website FAQs](#))
- WORKING FAQs – ([Website FAQs WORKING](#)) for daily review @ 4.30pm

**Scenario**

1. The participant has been accepted onto the project through JT by the installer under status 'Project Approved', and now we need to do touch base with them, get any feedback of the process to date and confirm the next steps.

.....

**VULNERABLE**

Establishing what the vulnerability is and asking how they would prefer you to carry out this call:

- *Hard of hearing, ensure all communication interactions are email/letter based. Or, if possible, they will schedule in a time to call the participant to allow them to set up any necessary hearing/recording equipment.*
- *Sight issues, all copresences in the first instance are telephone based.*
- *If they suffer from mental health issues, allow additional time is taken to explain the project, its requirements and the offering. They could also request for a trusted friend or family member to speak to communicate with to gain their permission for progressing.*

Please be sure to make a note in the CRM of any communication that would be relevant if somebody else in the team calls them.

1. Offer the chance to ask any questions along the way/or at the end.

.....

Tickbox	Subheading	Bullet points
<input type="checkbox"/>	Introductions	<ul style="list-style-type: none"> <li>• Good morning/afternoon, this is Beth calling from CrowdCharge, I was hoping to speak with X.</li> <li>• Thank you for your time today as I mentioned in the email, the purpose of this call is to:                             <ul style="list-style-type: none"> <li>○ Update you on your project status, and confirm that next steps in the onboarding process,</li> <li>○ Get any feedback on the process to date</li> <li>○ Ask about any interactions you've had with the installer or WPD,</li> <li>○ And answer any questions that you may have since when we last spoke.</li> </ul> </li> <li>○ If I cannot answer them myself – I will follow up with you after the call with further information.</li> <li>• As mentioned, I am not hoping to keep you longer than about 15mins. <i>[depends on Q &amp; As]</i></li> <li>• Is this still a convenient time to continue?</li> </ul>
<input type="checkbox"/>	Security	<ul style="list-style-type: none"> <li>• I am just going to ask a couple of security questions to make sure I have the right details in front of me and know I'm speaking to the right person;</li> <li>Can you please confirm the:                             <ol style="list-style-type: none"> <li>1. First line of address and your</li> <li>2. Postcode please</li> </ol> </li> </ul>
<input type="checkbox"/>	Contact Details confirmed	<ul style="list-style-type: none"> <li>• Have you contact details changed since we last spoke at all?</li> <li>• Confirm your Email address?</li> <li>• Phone number ending in XXX</li> </ul>
<input type="checkbox"/>	Consent to call recording	<ul style="list-style-type: none"> <li>• I just want to make you aware that this call will be recorded for training and monitoring purposes – are you happy to proceed with this?</li> <li>• <i>Why? Our protection &amp; yours [–pull any records required / history etc.]</i></li> <li>• <i>Privacy policy link found at CrowdCharge website if they need more info</i> <a href="http://crowd-charge.com/privacy-policy/">[http://crowd-charge.com/privacy-policy/]</a></li> </ul>
<input type="checkbox"/>	COVID-19 Policy	<ul style="list-style-type: none"> <li>• In the project correspondence received to date you will have seen links to our Covid-19 policy.</li> <li>• I just want to reassure you that measures are in place and we will keep the COVID-19 policy link on the <a href="http://electricnation.org.uk">electricnation.org.uk</a> website up to date with the latest information and guidelines. The installer will contact ahead you ahead of installation to confirm &amp; has their own COVID-19 policies and procedures.</li> </ul>

*Courtesy Call Script Sheet – process snapshot*

QUALIFICATION CALL	
Covid-19 Policy	Yes
Security	Yes
Contact Details Confirmed	Yes
Call Recorded?	Yes
Project overview/innovation	Yes
Project timelines	Yes
Project Hardware	Yes
Participant Parameters	Yes
Rewards/incentives	Yes
Exit fees	Yes
Project Energy Supplier	Yes
Broadband router	TalkTalk
Telematics	Yes
Installation Process/G99	Yes
Typical Plug in time (24hr format)	18:00
Typical plug out time (24hr format)	07:00
Qualification Call Complete	23/09/2020 

*Qualification call checklist criteria*

# 5 In Trial Customer Management

## 5.1 Fault logging and management

No faults have been logged to date as no chargers have been installed.

This quarter a fault logging system and process has been design, built and integrated with the Projects CRM account.

Participants are emailed a project support process document once their installation is scheduled. This document outlines the support form which participants are asked to complete should they encounter a fault with their project hardware, of energy supplier bill query. Participants which have an urgent fault are able to call a dedicated support number to speak to a member of the team immediately.

Screenshots of the Projects CRM Cases section which will be used to record, monitor, diagnose and report on faults to the project can be seen below.

*Fault Process – Cases Section on CRM Database*

## **5.2 Customer satisfaction and feedback**

As part of the recruitment process, CrowdCharge has built in a courtesy call with each participant once they have been approved/denied by the project installer. This is check in with the customer to ensure they are satisfied with the process to date, and with their correspondence with the project installers. These interactions will be recorded in the CRM system, with notable responses detailed in Project reports.

## **5.3 Other customer updates**

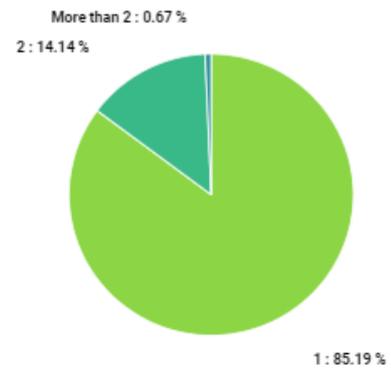
None at present.

# 6 Learning Reference Communication and Engagement Process

## 6.1 Learnings to date

During the recruitment phase, CrowdCharge has learnt that the number of applications from people who own or lease 2 or more EVs has increased drastically over the past few years since the inception of Electric Nation 1. On Electric Nation 1, a handful of applications had 2 or more EVs.

To date 15% of applications (40+) have multiple EVs at their properties thus demonstrating the requirements for DNOs to reinforce their networks to support the EV uptake, through innovative investigations of smart charging services such as Smart Charging (Electric Nation 1), V2G charging (Electric Nation Vehicle to Grid) and through infrastructure reinforcements.



*How many EVs do you keep at your property?*

# Glossary

# Appendix 1

Western Power Distribution (East Midlands) plc, No2366923  
Western Power Distribution (West Midlands) plc, No3600574  
Western Power Distribution (South West) plc, No2366894  
Western Power Distribution (South Wales) plc, No2366985  
Registered in England and Wales  
Registered Office: Avonbank, Feeder Road, Bristol BS2 0TB

[wpdinnovation@westernpower.co.uk](mailto:wpdinnovation@westernpower.co.uk)  
[www.westernpower.co.uk/innovation](http://www.westernpower.co.uk/innovation)

 @wpduk

