

SMICoP Change Report		Stage of the document in the process:
<h1>CR 063</h1> <h2>Amending SMICoP Customer Survey Questions</h2> <p>28/08/2020</p>		01 – Draft Change Report
		02 – Final Change Report
<p>Purpose of Change Request</p> <p>This change seeks to implement a number of amendments to the Domestic and Micro Business Monitoring and Compliance Customer Survey questions in line with a SMICoP Governance Board Working Group’s recommendations.</p>		
	<p>SMICoP Governance Board voted on the Change Request:</p> <ul style="list-style-type: none"> • That the change solution is Approved • That the implementation date is the date that is the first working day of a quarter following the lifting of the Customer Survey temporary wording • That the implementation technique is Big Bang 	
	<p>Impacted Clauses:</p> <ul style="list-style-type: none"> • SMICoP Section C 	
	<p>Audit Impacts: Possible</p>	

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Timeline		
The timetable for the progression of the Change Request was as follows:		
Change Request timetable		
The Secretariat recommends the following timetable:		
Change Report circulated to CAG for IA	05 August 2020	
Change Report presented to SGB	27 August 2020	
Final Change Report issued to the Authority	03 September 2020	
Authority Decision Due	12 October 2020	
Proposed Implementation Date	The first working day of a Calendar Quarter following the lifting of the temporary Customer Survey wording	

1 Summary

What

- 1.1 This change seeks to amend a number of changes within SMICoP, specifically within the Domestic and Micro Business customer survey questions, to help better achieve the SMICoP objectives and to have these changes implemented before the code obligations transition into the Retail Energy Code (REC).
- 1.2 The issues were discussed at Working Group RSWG 016 on 29 May 2020 and RSWG_02 016 on 28 July 2020. The Working Group members recommended a number of changes to be included in this Change Request.
- 1.3 These includes:
 - Allowing Suppliers to substitute the word 'equipment' for specific wording like 'new smart meter' or 'IHD' within Question 3 of the Domestic Customer Survey and within Question 2 of the Micro Business Customer Survey questions, to help the question resonate with the Customer's experience.
 - Replacing the word 'if' with 'when' in Question 4 of the Domestic Customer Survey questions to ensure the question structure is easy to understand.
 - Changing Question 5b within the Micro-Business Customer Survey so the intent can be clearer for the Customer to understand and avoid confusion.

COVID-19 and Temporary Survey Questions

- 1.4 In the period this Change request is progressing Suppliers are minimising the amount of time spent in people's homes and businesses. SMICoP requirements that were being fulfilled by the Installer on site, might be being carried out by a Supplier's office-based staff, to help protect customers and employees against COVID-19. Activities that were face-to-face – such as delivering Energy Efficiency advice and demonstrating IHD functionality - are being done in a remote, or a socially distant way.
- 1.5 The SMICoP Governance Board (SGB) met on 25 June 2020 and agreed that temporary changes to the SMICoP Customer Survey questions were necessary to ensure the Customer Survey

questions match customers' installation experiences during the COVID-19 pandemic. Ofgem agreed this was the right approach.

- 1.6 As a result, temporary amendments were made to some of the SMICoP Customer Survey questions for Calendar Quarter 3 2020. This was done by way of agreement and not a Change Request, in order to not permanently amend the wording in the Code.
- 1.7 The temporary survey questions will stay in force until Government guidance enables face-to-face communication during installation visits to resume. SGB are keeping these conditions under review.
- 1.8 The proposals contained within this Change Request will not override any temporary questions in place to help ensure customer and employee safety. If temporary questions are in force when the Change comes into effect, the temporary questions will endure until lifted.
- 1.9 Temporary questions are in place for Domestic Customers Questions 3 & 4, and Microbusiness Customers Question 2.
- 1.10 At SGB on 27 August 2020 the proposer and SGB Members agreed that it would be least disruptive to implement the changes in CR063 after the temporary wording has been lifted. To ensure consistency in the questions the changes to the questions would happen on the first working day of a Calendar Quarter, immediately following the lifting of the temporary Customer Survey questions so the implementation date would be 01 October 2020, or 04 January 2021, or 01 April 2021, or 01 July 2021.

Why

- 1.11 Throughout 2020 SMICoP Governance Board (SGB) members have raised issues concerning the wording in the Code. These points of discussion have been raised at different SGB meetings, directly with the Code Administrator, and via the Retail Energy Code (REC) Smart Meter Installation Schedule consultations.
- 1.12 Acknowledging that SMICoP will transition into REC on 01 September 2021, Parties believed that this gave them an opportunity to try and amend as many concerns and issues within the Code

before the REC Code Consolidations begins, so that the Code can have wording that can better achieve the SMICoP objectives.

- 1.13 This also gave Parties the opportunity to suggest any amendments that can be moved to an equivalent future Smart Meter installation regulatory code if Parties were not able to implement some changes before the REC Code Consolidations.
- 1.14 Based on feedback from Survey Companies, and customer experience, Suppliers identified a number of changes that were suitable for discussion.
- 1.15 The issues were discussed at Working Group RSWG 016 on 29 May 2020 and RSWG_02 016 on 28 July 2020. The Working Group members recommended a number of changes be implemented via this Charge Request.

How

- 1.16 The Working Group agreed three changes that would help improve the customer's smart meter installation experience. The changes make minor amendments to the original Monitoring and Compliance Customer Survey report questions.
- 1.17 The intent of this change is not to change the meaning of the questions, but to avoid any confusion or doubt in the mind of the Independent Survey organisation agent, or the customer, to promote consistency in response:
 - Allowing Suppliers to substitute the word 'equipment' for specific wording like 'new smart meter' or 'IHD' within Question 3 of the Domestic Customer Survey and within Question 2

of the Micro Business Customer Survey questions, will help the question resonate with the Customer's experience.

- Replacing the word 'if' with 'when' in Question 4 of the Domestic Customer Survey questions to ensure the question structure is easily understood.
- Changing Question 5b within the Micro-Business Customer Survey so the intent can be clearer for the Customer to understand and avoid confusion.

2 Why Change?

- 2.1 This change will ensure that there is consistency in the response, and avoid any customer frustrations when carrying out the SMICoP Customer Survey.
- 2.2 Due to SMICoP transitioning into REC on 01 September 2021, Parties who have in-depth experience and understanding of the Code have an opportunity to try and amend any concerns and issues within the Code before the REC Code Consolidations begins at the end of 2020.

3 Code Specific Matters

Legal Text

3. Survey Questions

3.1. This section contains a list of questions to be asked during the survey by all Suppliers using a yes/no/don't know/free text response. The questions should be asked in the same order that they appear in, with the demographic questions in Section C, Appendix D being addressed by all Suppliers using the cross-tabbed response forms provided in Attachments 1 and 2.

3.2. Additional wording has also been included to ensure that the most appropriate person is answering the survey. This should be included at the relevant stage to set the scene. The form of this wording can be amended so that it is tailored to meet each Suppliers' preference and to take into account whether the survey is being conducted by telephone or online. The survey should be done according to customer preference.

3.3. Suppliers should use all reasonable endeavours to engage in communicating with the Customers for whom English is not their first language, to ensure their responses are captured.

3.4. References in brackets refer to the SMICoP clause which includes the relevant requirement. These do not need to be included in the survey.

Domestic Customers

I would like to ask you some questions about the installation of your SMART Meter...I need to speak to the person who dealt with the [installation engineer] when the meter was installed. Are you the right person or do I need to speak to someone else?"

Question 1 Before someone came to change your meter, were you told that you were getting a smart meter? (A2.7.1)

Question 2 Were you offered an [Insert your own Supplier terminology (in home display)] (A3.5.1)

Consideration Point: If the customer requires additional descriptors to aid in understanding what the survey question is referring to the following wording can be used:

“A [Home Energy Monitor] is a portable device where you can see how much energy you’re using (past and present) and what it costs in pounds and pence.”

OR

“The [Smart Energy Display] is a hand held device which communicates with your smart meter and shows the amount and cost of your energy usage”

Question 3 Did the [installer/technician] provide a demonstration of the ~~equipment~~[insert your own Supplier terminology for equipment i.e. smart meter or IHD] installed? (A3.6.1)

Consideration Point: If the customer requires additional descriptors to aid in understanding what the survey question is referring to the following wording can be used:

“This is both a demonstration of the [home energy monitor] and being shown how to read the meter that was installed.”

Question 4 Did the [installer/technician] offer advice or information on how to use less [Insert your own Supplier terminology for energy i.e. electricity and gas consumption] during the visit [Insert your own Supplier terminology on how this advice may have been imparted, or the specific terminology or language used, if appropriate]? (A3.7.1)

If yes:

a) If When the [installer/technician] did offer advice or information, did you take up the offer?

If yes:

b) Did the advice or information given take into account your home and/or how you use [insert your own Supplier terminology for energy i.e. electricity and gas consumption]?

Consideration Point: If the customer requires additional descriptors to aid in understanding what the survey question is referring to the following wording can be used:

“For example, only boiling the water you need in your kettle, turning down your thermostat to save money, replacing traditional light bulbs with energy saving ones of the same brightness”.

Question 5 Were you asked to pay for any goods and services before, during or after the installation visit?

If yes

a. Had the [Supplier] asked for your permission to discuss goods and services before the visit? b. What goods and services were you asked to pay for?

Consideration Point: It was noted that Suppliers need to get consent before discussing goods and services with customers.

The final question refers to information about yourself:

Question 6 Do you, or anyone in your household who was present at the installation, have any long term illness, health problem or disability which limits your daily activities or the work you can do?

If yes:

- a. Did this person have any additional needs or specific requirements that the installer/technician needed to take into account during the installation? If yes:
- b. Did the installer/technician take into account these additional needs or specific requirements during the installation?

If no:

c. You said that the installer/technician did not take into account the additional needs or specific requirements during the installation. Why do you say this?

Micro-business Customers

I would like to ask you some questions about the installation of your Smart meter. As this survey includes questions about the discussions that took place before, during and after the installation visit; could I please speak with the manager, or the most appropriate person to answer these questions?

Question 1 Before someone came to change your meter, were you told that you were getting a smart meter? (A2.7.1)

Consideration Point: This question is to be addressed to the customer (bill payer).

Question 2 Did the [installer/technician] provide a demonstration of the equipment [insert your own Supplier terminology for equipment i.e. smart meter or IHD] installed? (A3.6.1)

Consideration Point: This question is to be addressed to the individual present at the installation.

Question 3 Did [your Supplier] offer advice or information on how to manage your [Insert your own Supplier terminology for energy i.e. electricity and gas consumption] usage [Insert your own Supplier terminology on how this advice may have been imparted, or the specific terminology or language used, if appropriate]?

This advice could have been given before, during or after the visit (A3.7.1)

Consideration Point: This question is to be addressed to the individual present at the installation if appropriate.

Question 4 Was there a charge for installation of the smart meter? (A2.7.4)

If yes

a. Were you made aware of this before the visit took place?

Consideration Point: 'Charge' in this question refers to the equipment installed not charges for any remedial work.

Question 5 Did you indicate any specific operational business needs when the installation appointment was being scheduled? (A2.7.6)

If yes [to Question 5](#)

a. Were these needs taken into account during the installation?

If no [to Question 5.a](#)

b. what were the operation business needs that you identified [that weren't taken into account in the installation process](#)?

Question 6 Did the Supplier check whether your premises has any domestic premises associated with it? (A3.3.13)

Consideration Point: This question is to ensure that were a reasonable request is made Suppliers take this into account.

4 Solution

SGB Assessment

The SMICoP Governance Board (SGB) assessed CR063. The SGB is open to all parties, including Large Suppliers, Small Suppliers, Microbusiness Suppliers, Citizens Advice, BEIS, Ofgem, Energy Ombudsman, Metering Agent representatives.

- 4.1 Meetings were held in open session and the minutes and papers of each meeting are available on the SMICoP website – www.SMICOP.co.uk.
- 4.2 SGB issued the change for consultation to gather information and feedback from the Change Advisory Board and interested GB energy market participants.

CR 063 Impact Assessment

- 4.3 CR063 was issued on 05 August 2020 to the Change Advisory Group (CAG) for consideration and there was 1 response received.
- 4.4 A summary of the responses received, and the SMICoP Governance Board’s conclusions are set out in Appendix 1.

5 Relevant Objectives

Evaluation Against the SMICoP Objectives

- 5.1 For a SMICoP Change Request to be approved it must demonstrate at least one of the following two things:
 - 5.1.1 How it better meets the SMICoP Supply Licence Objectives. These objectives are set out in the Condition 41 and 42 of the standard electricity supply licence and Condition 35 and 36 of the standard gas supply licence.
 - 5.1.2 The Proposer has identified the SMICoP Objectives it deemed to be better facilitated by this Change Request, which have been highlighted below:

Impact of the Change Request on the Relevant SMICoP Objectives:

Domestic Customer Objectives [SLC 41 & 35]	Identified impact
<input checked="" type="checkbox"/> a) The licensee and any Representative provides and maintains a standard of service which helps to ensure that Domestic Customers’ experience of the	Positive

installation of Smart Metering Systems at their premises meets their reasonable expectations.	
<input checked="" type="checkbox"/> b) All activities undertaken by the licensee and any Representative in relation to the installation of Smart Metering Systems are conducted in a fair, transparent, appropriate and professional manner.	Positive
<input type="checkbox"/> c) Domestic Customers are given information about, and during, the installation of Smart Metering Systems which: (i) is complete and accurate; (ii) does not mislead them; and (iii) informs them about the benefits of Smart Metering Systems and about what to expect in relation to the installation process.	Positive
<input type="checkbox"/> d) Domestic Customers are not subject to unwelcome Marketing during any visit to their premises for the purposes of installing Smart Metering Systems.	Positive
Micro Business Customer Objectives [SLC 42 & 36]	Identified impact
<input checked="" type="checkbox"/> a) the licensee and any Representative provides and maintains a standard of service which helps to ensure that Micro Business Consumers' experience of the installation of Smart Metering Systems at their premises meets their reasonable expectations.	Positive
<input type="checkbox"/> b) All activities undertaken by the licensee and any Representative in relation to the installation of Smart Metering Systems are conducted in a fair, transparent, appropriate and professional manner.	Positive
<input type="checkbox"/> c) Micro Business Customers are provided with information about, or during, the installation of Smart Metering Systems which: (i) is complete and accurate; (ii) does not mislead them; and (iii) informs them about the benefits of Smart Metering Systems and about what to expect in relation to the installation process.	Positive

5.2 This change will help Suppliers better achieve the SMICoP objectives by improving the quality of the output of the SMICoP Customer Survey, a key tool for maintaining and monitoring standards during the Smart metering installation experience, and ensuring a fair, transparent, appropriate and professional manner.

5.3 The proposed amendments will improve the questions by making them either easier to understand, or better reflect the process that the customer will be recalling. This will help the Code Administrator and the Authority better monitor and maintain a standard of service.

6 Impacts & Other Considerations

Customer Impacts

- 6.1 This Change Request updates the wording within the SMICoP Domestic and Micro Business customer survey questions, and this impacts on what type of questions customers have to answer if they participate within a SMICoP customer survey.

Supplier Impacts

- 6.2 This Change Request updates the wording within the SMICoP Domestic and Micro Business customer survey questions, and this will impact Suppliers by providing updated wording within the customer surveys to their customers after a smart meter installation has taken place.

Environmental Impacts

- 6.3 This Change Request updates the wording within the SMICoP Domestic and Micro Business customer survey questions, and thus is not expected to have any foreseeable environmental impacts.

Engagement with the Authority

Ofgem have been invited to provide comment and steer at every stage. Ofgem have been engaged throughout the development of this Change Request by providing feedback through the SMICoP SGB meetings and through the Working Group.

7 Implementation

- 7.1 The proposed implementation date is on the first working day of a quarter following the lifting of the temporary wording..
- 7.2 It is noted that this date assumes an Ofgem determination is received within the timescales set out in the indicative timeline on page 1.
- 7.3 The change will be implemented via the Big Bang technique.

8 Legal Text

- 8.1 The legal text for CR063 is provided as Attachment 1. As the implementation date is conditional, this and the Code Version number will be updated before implementation.
- 8.2 The Change Proposer has considered the Legal Text and is satisfied that it meets the intent of the Solution.

9 Voting

- 9.1 On 27 August 2020 the SGB reviewed CAG's comments and discussed CR 063 and voted to approve the CR. The voting results are as follows:

Supplier Category	Member	Solution	Implementation Date	Implementation Technique
Large Supplier	Utility Warehouse	Approve	The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Micro-Business Supplier	BES Utilities	Approve	The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Micro-Business Supplier	Haven Power and Opus	Approve	The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Citizens Advice	Citizens Advice	Approve	The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Large Supplier	Centrica	Approve	The first working day of a quarter following the lifting of the	Big Bang

				temporary wording.	
Large Supplier	E.ON and Npower	Approve		The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Large Supplier	SSE and OVO	Approve		The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Micro-Business Supplier	SSE Energy Supply	Approve		The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Large Supplier	EDF	Approve		The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Large Supplier	Bulb	Approve		The first working day of a quarter following the lifting of the temporary wording.	Big Bang
Small Supplier	Igloo	Approve		The first working day of a quarter following the lifting of the	Big Bang

temporary
wording.

- 9.2 The Final Change Report for CR063 will be issued to the Authority on 01 September 2020
- 9.3 In accordance with section B2.7.5 of the SMICoP, the Authority may give:
- Its approval to the proposed revisions;
 - Notice that it is withholding approval; or
 - Notice that it is unable to reach a decision within 30 working days.
- 9.4 Should the Authority not respond to this Change Request within 30 Working Days, the Change Request will be treated as approved by the Authority.

10 Recommendations

SMICoP Parties Recommendation

- 10.1 SMICoP Parties recommend:
- that CR063 should be implemented.
 - that CR063 better facilitates the Relevant Objectives.

11 Attachments

- [Attachment 1 – Legal Text](#)

Appendix 1 – CAG Responses

CHANGE ADVISORY GROUP RESPONSE TO CR 063

Respondent	Legal Text	Implementation Date	Implementation Technique	Comments including proposed improvements to the CR
Haven Power and Opus	Approve	Approve	Approve	On behalf of Drax (Haven Power and Opus Energy), the only comments I have are on the implementation of CR063 – Though the proposed implementation date is 4th Jan '21, if at all possible, SMICoP should aim to implement these wording changes at the same time that the temporary changes to wording are removed. I appreciate there is still a great deal of uncertainty around COVID-19, and this may be easier said than done! However, the changes to survey questions are made by an independent survey company and, in our case, there is a cost attached each time changes are made which needs to be considered.