

HEATROPOLIS

CUSTOMER ENGAGEMENT

STRATEGY

Work Package 6

Contents

Introduction	3
Aims and objectives.....	3
Guiding principles	4
Roles and responsibilities	5
Customer and stakeholder mapping	5
Timeline.....	7
Communications.....	8
Supporting vulnerable customers	10
Incentives budget	11
Trial customer recruitment	11
Surveys and focus groups	12
Customer data and GDPR	13
Appendix	13

Introduction

Heatropolis is a Strategic Innovation Fund (SIF) project aiming to develop novel technical and commercial solutions to unlock electrical flexibility from heat networks. The project seeks to achieve better outcomes between heat and electricity networks. Through intelligent design and operation, the project aims to accelerate the decarbonisation of heat networks, delivering flexibility and load reduction to avoid electricity system reinforcement costs.

The project will conduct iterative trials over three winters across three distinct heat network archetypes. These are (1) large-scale commercial and residential, (2) mid-scale residential estates, and (3) small-scale residential, multiple occupancy building. Each trial site will include end customers living and/or working there. Work Package 6 is responsible for engaging with these end customers, and this document lays out the strategy for those engagement activities. The project has 8 work packages in total. Work Package 2 will inform the commercial arrangements to be explored, Work Package 3 will be responsible for the detailed planning of the trials (which will feed directly into our customer approach), and Work Package 4 will be responsible for the execution and analysis of the trials.

Aims and objectives

The purpose of this document is to outline the approach to customer engagement for the Heatropolis trials, enabling an efficient and smooth trial delivery. It covers four key phases of the trials: (1) the pre-trial, (2) ramp up, (3) main phase and (4) wind down. It outlines the methods we will use to inform, recruit and engage with customers and the trial sites, and it will define an approach for how we will obtain feedback on the innovations proposed and trialled.

The aims of trial customer engagement are as follows:

- To inform customers about the purpose and context of the trials
- To recruit an acceptable number of customers based on the target set out in the trial objectives
- To ensure timely updates are shared with customers
- To ensure customers have clear channels to raise concerns and to manage any concerns as soon as they arise
- To communicate trial critical actions

- To gather robust feedback based on trial objectives
- To ensure that the trials are received positively

This strategy is being developed in parallel with the wider trial strategy and commercial arrangements and may therefore be updated as the trial interventions, the specific change being tested in the trial, become solidified through the trial detailed design activities. For each trial, a detailed customer experience and process design will be developed in collaboration with Work Package 3: Trial strategy and design. At present, we believe there are two main ways in which the trials could affect customers.

- **Option 1 – Customers are not impacted:** if the chosen trial interventions do not require active customer participation, it is anticipated that any measures implemented by the Heat Network Operator (HNO) will not affect customer comfort levels. In such case, customers should not notice any change to their heating services. Engagement efforts will therefore focus on informing customers that the trial is taking place and collecting their views and feedback.
- **Option 2 – Customers are impacted:** if the chosen trial interventions do require active customer participation (or for example, where access to customer's homes is needed to install hardware) then customers will need to be actively recruited and asked to opt into the trials. These customers must be fully informed about the trials and receive timely updates at appropriate time intervals. Lastly, they will be invited to share their views and feedback on their experience.

In the first trial (winter 2025/26), we will monitor the successes and drawbacks of this customer engagement approach through feedback collected through surveys and take a continuous learning approach to make adjustments where needed in trials 2 and 3. This strategy document can then be updated based on those learnings for trial 2 and 3.

Guiding principles

The customer engagement strategy has been developed based on the following guiding principles:

- **Provide trust and transparency:**
Provide honest information throughout the trials, without over-promising on benefits or under-representing potential drawbacks to allow customers to make informed decisions about trial participation. Clearly communicate the project purpose and scope, so participants understand the “why”.
- **Obtain active consent:**

Consumers are to be asked to consent to their participation in trials of demand side optimisation solutions, such as smart controls and HNO to end consumer commercial arrangements.

- **Prioritise fairness and consistency:**

Align customer experience across trials where possible to avoid unintended variation across suppliers and service providers. Consider the different vulnerabilities, preferences, and experiences of customers. Avoid potential benefits being skewed towards a certain group or category of stakeholders.

- **Customer protection:**

Comply with GDPR regulation and publish data agreements, safeguard customer data. Ensure trialists aren't exposed to untoward risk and are not worse-off due to participation in the trials. Ensure customers can access support easily through a channel of their preference.

Roles and responsibilities

The key roles for customer engagement are outlined below:

- **Heat network operators and/or service providers** will own the customer relationship. They will be responsible for managing them on a day-to-day basis, answering their queries and operational issues. They will be responsible for disseminating communications to the customers. In the case of Archetypes 1 and 2, this will be **Metropolitan**. In the case of Archetype 3, this will be determined once a trial site has been secured.
- **Heatropolis team** will provide content input on communications, surveys, messaging, etc. to standardise this across the trial.

Customer and stakeholder mapping

Site Archetype Overview:



Archetype 1 overview:

Metropolitan Provides Heat to 1,698 residential connections and 64 Commercial connections at Kings Cross See Appendix 1.

Metropolitan act as the Network Operator working on behalf of Related Argent the developer. Within the estate some blocks are managed and operated by a managing agent .

There are two Housing Associations who own properties across the network, [REDACTED] Metropolitan bill and provide O&M service to their residents.

Residential properties across the estate all have an in home HIU, Heat Meter and Thermostat installed. The make and model vary based on the phase of the project. See Appendix 2.

Engagement will need to be split between on location and digital communication channels.

Metropolitan will lead on a range of Trial engagement activity, the below defines the best approach based on the customer type.

Commercial Retail Customers will most likely interact with a mix of location visits, hard collateral and email.

Secondary Network Owners, managing Agents and Housing Associations will require bespoke meetings and email updates.

Residential Customers will best engage with onsite residential meetings; collateral placed in Concierges and email communication.

Archetype 2 Overview:

Metropolitan Provides Heat to 35 residential connections which will increase to up to 950 as properties are sold and connected. There will be future commercial connections with a school being added to the Network later.

Metropolitan act as the Network Operator working on behalf of Taylor Wimpey, the developer.

75 properties are owned by [REDACTED] Housing Association, Metropolitan bill and provide O&M services to their residents.

Residential properties all have a SAV Flatstation HIU and Kamstrup Heat meter and main timer and thermostats in each room served by underfloor heating.

Chilton Woods will have new operating strategies which will be trialled at the energy centre which don't require customers to do anything.

Engagement will need to be split between on location and digital communication channels.

Metropolitan will lead on a range of Trial engagement activity, the below defines the best approach based on the customer type.

Housing Associations will require bespoke meetings and email updates.

Residential Customers will best engage with onsite residential meetings; collateral placed in Sales and Marketing suits and email communication.

Archetype 3 Overview:

To be confirmed. For Archetype 3, Heat Network Operators will be kept fully informed throughout the project to ensure clear and consistent messaging to customers to allow full and continued support and knowledge management with participant customers.

Timeline

Each Archetype will require a tailored approach to communication (refer to communications and timeline). The timeline below sets out the broad trial engagement timeline.

The first step will take place at least 12 weeks prior to the trial commencement date, focusing on onsite awareness through face-to-face engagement meetings, collateral placed in communal areas with an opportunity to access online content and register an interest in signing up to the trial.

The second step will take place at least 8 weeks prior to the trial commencement date, where a digital email campaign will take place providing information on the trials purpose, objectives and potential consumer impacts (if any). A link will be provided to all recipients to register an interest in signing up to the trial.

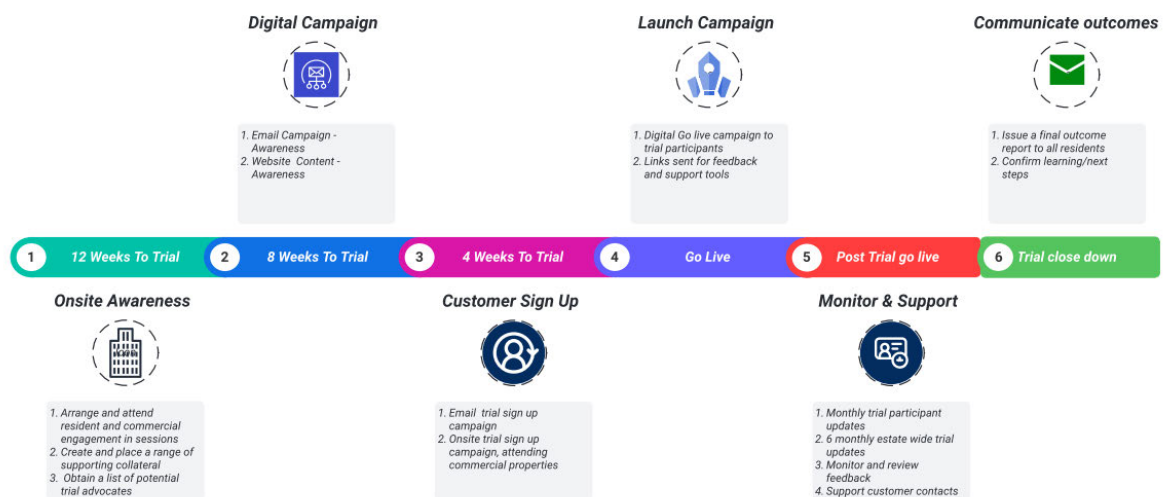
The third step will take place at least 4 weeks prior to the trial commencement date. This phase will focus on trial sign up, all participants that have registered an interest in signing up to the trial will be contacted first. If the volume of participants is lower than required to meet the trial requirements further invites will be sent to residents.

Step four will take place on the launch date of the trial. Communication will be sent to all registered participants that will include ways to get in touch, support information and links to provide feedback.

Step five will continue throughout the trial, providing monthly updates to trial participants and 6 monthly updates to all residents. A review of feedback will be undertaken and any concerns raised will be addressed and communicated as part of the updates.

Step 6 will focus on closing out the trial and updating all residents on the findings and next steps.

Heatropolis Customer Trial Engagement Timeline



Communications

For consistency, communication to customers will align with the customer trial engagement timeline. Communications will be distributed through visual communications, in the form of a wallboard poster added to communal areas. Active participants will have provided direct contact information and will receive updates via their preferred channel of email or other appropriate digital channels. Signposting to the Heatropolis page on the UK Power Networks website will also provide continuous updates for the programme.

Communications will be sent to participants before the trial, during the trial and after the trial. The level of communications required is dependent on if customers are active or indirect participants. Active participants are customers who have taken part in active trial interventions, as per option 2 described in “Aims and objectives”. Indirect

participants are where customers do not require active customer participation, as per option 1 described in “Aims and objectives”.

Pre-trial

Warm up communications will be initiated to ensure all customers, whether active participants or indirect participants, have been made aware, kept informed, and given the opportunity to feedback comments and questions through clear communication pathway channels. Communications will be tailored for active and indirect participants to provide clarity on involvement. As the trials develop, communications will differ as direct participants are provided with communication on the tasks they will be required to actively participate in. Indirect participants will be kept informed on project developments. The trial sites for Archetype 1 and 2 are managed by Metropolitan so communication will be issued from Metropolitan. Archetype 3 (TBC) communications, will be issued by the Heatropolis team as it will not be managed by Metropolitan. Visual communications, in the form of a wallboard poster will be added to suitable communal areas for all customers, whether indirect or active participants to raise awareness of the Heatropolis project, also suitable for customers who may move to the network after the trials have started. If new customers move in during a trial, they will be identified and issued communications and will be given the opportunity to participate. Signposting to the Heatropolis page on the UK Power Networks website will also provide continuous updates for the programme.

Trial

Across the three archetypes, communication throughout the trials will differ depending on the detail of the trial, following the same format from warm up through to close down. During the trial, instructions communications to active participants will be issued to ensure clear guidance of actions they may need to undertake for trial participation.

Participants will be able to email, or call should they have any questions about the trial at any time. Any feedback will be monitored to provide support and answer questions. Some of which may be of broader value and can inform website updates.

General trial updates communications will be made available on the UK Power Networks so they can update their website inline with Metropolitans dedicated trial website page, will be updated throughout the trial when there has been progress to ensure transparency. Customers will be able to opt out of the trial and from receiving informative communications at any point during pre, during or post a trial. Visual communications will be provided in communal areas for sites that will be participating in the trials, wall boards and hard copies will be made available and drop-in sessions will be offered for face-to-face questions.

Post trial

On trial completion, close down communications will be issued to participants. These final communications signal the trial has come to a close and summarise the trial, what the objective was and next steps, or a summary of trial conclusions. It will also indicate when to expect communications about the next Heatropolis trial, if applicable. Active participants will have the options to opt-out of participating in the trial during and in between trials. In-direct participants will be kept informed of trial completion via the Heatropolis page on UK Power Networks website and communications within communal areas.

Messaging guidelines

Messaging and tone of voice will be consistent to that of the each HNO for customers in each archetype as all communications and the overall customer relationship and impact will be supported by the customers supplier (HNO) but also approved by the Heatropolis team to ensure a consistent approach across the archetypes.

Supporting vulnerable customers

At each stage, in the twelve weeks prior to trial, vulnerable customers will need to be identified to be supported, and heat network operators will hold this information, identified or provided by the customer and added to a Priority Services Register. Once identified, an understanding of the vulnerability will allow bespoke support depending on the nature of the interaction, in this strategy, communication. Vulnerable customers will be identified using the network operator's priority service register.

HNOs and DNOs may have differences in their identification of vulnerability. However a vulnerable customer can be broadly categorised as someone who has a disability (mental or physical), or who is chronically ill; has a sight or hearing difficulty; is living with dementia, is having dialysis treatment at their property; relies on medical equipment, a household with children under the age of five, is experiencing financial hardship; is of pensionable age; has communication difficulties; or is isolated geographically.

Vulnerable customers need to be protected, all policies, procedures and practices are reviewed to ensure inclusive and accessible. Communications will be tailored to be accessible, braille, audio, large print and translated documents. A doorstep password scheme to ensure visits are legitimate visits. Support with payment options against usage and if financial vulnerability, a dedicated financial support team with debt schemes to be utilised. Should a loss of supply should be experienced, alternative heating supplies may be offered during incidents, including temporary heaters.

Incentives budget

Incentives structures for the trials are still under development and will be confirmed in detail in each trial’s detailed design document. We propose financial incentives should primarily be used to recruit customers for active participation (option 2). Smaller incentives, such as prize draws or low value vouchers, could be used to encourage survey responses. Additional incentives could be offered for more in-depth qualitative feedback through focus group participation. Taking a balanced approach to incentives should help us to increase participation and engagement from trial customers.

Trial customer recruitment

The recruitment methodology will differ depending on the level of customer engagement required for each trial. The options, as described in “Aims and objectives”, include option 1, where customers do not require active trial interventions and option 2, where customers do require active trial interventions. For both options, recruitment will primarily be conducted by email. Metropolitan will oversee recruitment for Archetype 1 and 2 and the Heatropolis team will oversee recruitment for Archetype 3.

For option 1, active recruitment will not be required and informing residents that the trial is happening will be sufficient. Customers will receive communication via their preferred method of email or other appropriate digital channels that includes messaging about the Heatropolis project aims, a description of what customers should expect, and a notice to expect further emails about any surveys or focus groups that may be conducted. Customers may opt out of receiving direct communications at any time. Customers will also be informed of the trial through signposting in communal areas.

For option 2, active recruitment will be required. In this case, recruitment emails will include messaging about the Heatropolis project aims, a description of what would be requested of customers participating in the trial, and the potential financial benefits of taking part. Target recruitment levels will be set in collaboration with the trial detailed design planning team. Should email recruitment not yield the target recruitment level,

additional recruitment methods may also be used. This includes signposting in communal areas or reaching out to customers by phone.

As part of the active recruitment process, customers will also complete a sign-up survey and agree to the terms and conditions of the trial. Data collection, processing, use and sharing will be covered in the terms and conditions, with consent to these data uses, including data sharing with project partners forming part of the agreement. The recruitment survey will collect information about the customer's household make-up and properties. This data will be used to examine how representative the customer demographics are.

Surveys and focus groups

Customer feedback will be gathered to assess the customers' views about the trial and how it is working out for them. This feedback will be gathered through two main methods:

- **Surveys:** Surveys will be conducted to collect qualitative data about customer demographics and trial perceptions. These will be digital, except where needed due to customer needs, where a small number could be accommodated via telephone or via post.
- **Focus Groups:** Focus groups will be conducted with 4-6 customers per group, where they will engage in a moderated discussion to explore their perceptions of the trial. These can be held online or in person, and this will be finalised once more details are available on preferences of trial participants.

Surveys will take place twice during trials (at the beginning and at the end of the trial) and will be largely digital. Information gathered from the customer on communications preferences at the beginning of the trial will be used to help inform and refine channels for the survey. For active participants a mid-trial survey will also be issued to ensure any potential issues with their involvement can be flagged and rectified before the end of the trial.

The survey at the beginning of the trial will capture information about participant attitudes. It will also assess the willingness of participants to participate in focus groups at a later stage. In this way, the Heatropolis team will have a pool of participants which they can contact directly when it comes to organising the focus groups. The survey will also ask active participants if they are happy for their personal information to be shared. This will be used to analyse the results according to demographic segments.

Focus groups will be conducted towards the end of the trial. They will be a qualitative means of gathering data and give customers the opportunity to speak in a group and discuss with their experience with other trial participants. Focus groups will be split by

residential and commercial customers, as we expect these two groups to have different experiences and perspectives on the trials. Focus groups would be conducted in conjunction with heat network operators / service providers with support from Guidehouse. Standard question topic guides will be developed to explore issues relevant to the trials and key research questions, while ensuring a standardised approach. We propose that focus groups are recorded and transcribed with results anonymised and presented in aggregated format.

The structure of the surveys and focus groups will be developed separately to this document, as part of the work package 6 activities.

Customer data and GDPR

Data will be reviewed by the data owner prior to sharing with the project group. All employees who review and share data will have an up-to-date record of GDPR compliance and will follow the Data owners approved policy. This will ensure any data shared is limited to data that is relevant to the project only. Currently, Metropolitan are the Data owner for Archetypes 1 and 2, and we include data sharing terms in our heat agreements that allow us to share relevant data with approved third parties. The contracts in place across the Heatropolis project allow for all parties to be data processors, supporting the ability to share controlled data. If a third party is introduced to support trials on Archetype 3, GDPR and data sharing terms should be included in the contract, this will allow the appointed network owner to share customer data, they will need to check and confirm their heat supply agreements to ensure they are allowed to do so.

How we will we ensure data is appropriately handled and secured: Data will be limited to critical data to support the objective of the trial. We will anonymise data where personal information that could be used to identify an individual is not required.

Who will be handling the customer data: Metropolitan and Guidehouse.

Appendix

1. Kings Cross Commercial connections

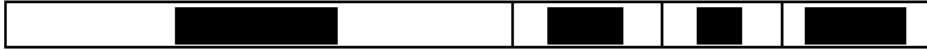
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
13	13	13
14	14	14
15	15	15
16	16	16
17	17	17
18	18	18
19	19	19
20	20	20
21	21	21
22	22	22
23	23	23
24	24	24
25	25	25
26	26	26
27	27	27
28	28	28
29	29	29
30	30	30
31	31	31
32	32	32
33	33	33
34	34	34
35	35	35
36	36	36
37	37	37
38	38	38
39	39	39
40	40	40
41	41	41
42	42	42
43	43	43
44	44	44
45	45	45
46	46	46
47	47	47
48	48	48
49	49	49
50	50	50
51	51	51
52	52	52
53	53	53
54	54	54
55	55	55
56	56	56
57	57	57
58	58	58
59	59	59
60	60	60
61	61	61
62	62	62
63	63	63
64	64	64
65	65	65
66	66	66
67	67	67
68	68	68
69	69	69
70	70	70
71	71	71
72	72	72
73	73	73
74	74	74
75	75	75
76	76	76
77	77	77
78	78	78
79	79	79
80	80	80
81	81	81
82	82	82
83	83	83
84	84	84
85	85	85
86	86	86
87	87	87
88	88	88
89	89	89
90	90	90
91	91	91
92	92	92
93	93	93
94	94	94
95	95	95
96	96	96
97	97	97
98	98	98
99	99	99
100	100	100

[illegible]

2. Kings Cross Asset information

Heat Meter Assets

[illegible]



Incentives budget breakdown

