

TEMPLATES STEP 4. THE STH CUSTOMER JOURNEY










The STH customer journey 4 	M. The assistance strategy	Which is your customer journey framework? Which functionalities do you intend to provide?	<input type="checkbox"/>		
	N. The Services	Which are the existing local needs that will define the touchpoints and the sub-stops? Which are the existing resources (services, tools or activities) solving these touchpoints? Which are the gaps that will be developed to complete the assistance?	<input type="checkbox"/>		
	O. The tools	Which tools are required to solve each service?	<input type="checkbox"/>		
	P. The Staff	Which are the objectives and target groups for the training programme of your OSS?	<input type="checkbox"/>		

Table 1. Test materials for step 4

This step (and its sub-steps) aims to define your local context implementation strategy in order to design a proper long-term smooth experience customer journey harmonized with the StH validated framework.

- For sub-steps **M. The assistance strategy** and **O. The tools**, additional information is available in [D3.2 Strategy & structure to implement the Citizen Hub concept for the two pilots](#).
- For sub-step **N. The services**, the DIY document is available in [D2.4.- Mapped suitable protocols and methods for quality control of the renovation works \(including skills definition\) and for buildings performance monitoring](#).
- For sub-step **P. The staff**, the DIY document is available in [D3.6. Training program for the Citizen hub staff in the two pilots](#).

STEP 4.1. – IMPLEMENTATION STRATEGY

Introduction

First of all, keep in mind that this methodology aims to draft a structure and strategy for implementing the Citizen Hub concept in your context. This means you need to scout your **adaptation to the StH customer journey**, fill the gaps, and **design your services menu**.

For doing so, have at hand [Deliverable 3.2](#), where you will find, for each stage:

- Objectives and goals
- Risks
- Touchpoints

This checklist deals therefore with the mapping of suitable tools and mechanisms that can assist you with the implementation of each step of the customer journey model and help follow the decision-making process of the customer.





A. The customer journey framework

Please check table below and just **mark the steps** you think you need to implement for delivering a complete service to your customers and split your answer **according to the profile to whom the service is addressed**.

You can add comments that help you define the functionalities or tools that you are looking for on each of them.

Stop 0 - ON-BOARDING				
	AWARENESS	INTERACTION		
demand				
supply				
staff				
Stop 1 - EVALUATION				
	SELF EVALUATION	ASSISTED EVALUATION		
demand				
supply				
staff				
Stop 2 - DESIGN & FORMALIZATION				
	DESIGN	SELECTION	FORMALIZATION	
demand				
supply				
staff				
Stop 3 - REALIZATION				
	TRAINING	ASSESSMENT	MEDIATION	QUALITY ASSURANCE
demand				
supply				
staff				
Stop 4 - VALIDATION				
	FEEDBACK	COMPARISON	MONITORING	CERTIFICATION
demand				
supply				
staff				



Same for the next step:

Stop 2 - DESIGN & FORMALIZATION						
DESIGN		SELECTION		FORMALIZATION		
demand						
supply						
staff						
	Functionalities	Tools	Functionalities	Tools	Functionalities	Tools
To T3.6 & T4.7 Platform functionalities definition & implementation						

For the design and formalization phase you will count on the tools _____

 _____ to help users go to the next step.

(To T4.7 Platform functionalities implementation)

At the other end, you need to find out how to overcome the lack of resources for _____

 _____ and avoid users to dropout the process.

Same for the next step:

Stop 3 - REALIZATION



	TRAINING		ASSESSMENT		MEDIATION		QUALITY ASSURANCE	
demand								
supply								
staff								
	Functionalities	Tools	Functionalities	Tools	Functionalities	Tools	Functionalities	Tools
To T3.6 & T4.7 Platform functionalities definition & implementation								

For the realization phase you will count on the tools _____

 _____ to help users go to the next step.

(To T4.7 Platform functionalities implementation)

At the other end, you need to find out how to overcome the lack of resources for _____

 _____ and avoid users to dropout the process.

(To T3.6 Platform functionalities definition)



And for the final step:

Stop 4 - VALIDATION								
FEEDBACK		COMPARISON		MONITORING		CERTIFICATION		
demand								
supply								
staff								
	Functionalities	Tools	Functionalities	Tools	Functionalities	Tools	Functionalities	Tools
To T3.6 & T4.7 Platform functionalities definition & implementation								

For the validation phase you will count on the tools _____

 _____ to help users go to the next step.

(To T4.7 Platform functionalities implementation)

At the other end, you need to find out how to overcome the lack of resources for _____

 _____ and avoid users to dropout the process.

(To T3.6 Platform functionalities definition)





STEP 4.2 - SUPPORTING SERVICES MAP

More information available in [D2.4.- Mapped suitable protocols and methods for quality control of the renovation works \(including skills definition\) and for buildings performance monitoring.](#)

First, keep in mind that this methodology aims to draft a set **supporting services** for ensuring quality of works suited for all the itineraries designed according to previous tasks selected targets and solutions, at the moment of its implementation and for a potential roll-out.

This checklist deals therefore with the mapping of suitable protocols and methods for quality control of the renovation works (including skills definition) and for buildings performance monitoring, this is, the **already available methods, tools and services suitable for the renovation process**, beyond the holistic home renovation personal assistance offered by the Citizen Hub, such as:

- quality control of the renovation works
- definition of skills
- energy, comfort and IEQ performance monitoring (and data processing and display in an attractive and understandable way)

Furthermore, it is investigated what **other local activities and organizations are applicable for efficient Citizen Hub roll-out** (e.g., existing energy or housing offices).

A. The existing resources in place

Before starting this journey, have Deliverable 2.4 Section 3 at hand.

This section is twofold, for each category of supporting services: in one hand, the existing initiatives at EU level that can be used in the ecosystem will be listed (see Section 3 of the Deliverable 2.4), and on the other hand, the existing local initiatives or in-house know-how are put together.

A. 1. Training

The objective of mapping the existing and applicable training resources is to **enhance** the quality of the renovation works demanded by the public and assisted by the OSS services in the elaboration stage, where external contracting is facilitated.

First of all, think of the **purpose** of your mapping training resources:

- Is it for ensuring the understandability of the proposed quality solutions?
- Is it for ensuring the quality of the designed solutions?
- Is it for ensuring the quality of the implemented solutions?

First option focuses on demand side and onboarding, evaluating stages; second and third focus on supply side for both design and construction stages, and affect the elaboration stage services provided by the Citizen Hub.

Purpose	Focus	Stages				
a)	Demand					
b)	Supply					
c)	Supply					
Other?						
To Service Model						

Now, think of the training **sources** available at your context level in order to know better your demand and/or supply side sources of (in)formation when intending to find out or perform the best





interventions in the residential building sector (such as YouTube videos, secondary school specialization, professionals’ associations training, private academies...):

Now, look at next table, which intends to summarize the existing supporting services related to training, listed above, and classify them keeping in mind why will you be able to **capitalize** them in your service menu definition, this is, because:

- they come from EU projects applicable in your context,
- they belong to you or your partners, or
- they are already working in your area and can find complementarities for both entities.

This is important because the agreements for using them will be different in the different options.

Remember: these are resources in place, regarding training and capacitation, for ensuring quality of the renovation works facilitated by the Citizen Hub through e.g., the professionals, installers and/or contractors registries.

EU (From D2.4 section 3 or others)	In-house (Partners resources)	local (Geographically available initiatives)
To Service Menu		To pop-up

A.2. Certification

The objective of mapping the existing and applicable certification schemes in place is to **proof** the quality of the solutions proposed and renovation design, works and results facilitated through the OSS services through an independent body (impartial third person).

First of all, think of the **purpose** of your mapping certification resources:

- a) Is it for proofing the quality of the proposed solutions?
- b) Is it for proofing the quality of the designed solutions?
- c) Is it for proofing the quality of the implemented solutions?

First option focuses on demand side and onboarding, evaluating stages; second and third focus on supply side for both design and evaluation stages, and affect the elaboration stage services provided by the Citizen Hub.

Purpose	Focus	Stages				
a)	Demand					





b)	Supply					
c)	Supply					
Other?						
To Service Model						

Now, think of the certification **sources** available at your context level in order to know better your demand and/or supply options to get or provide trusted services (such as mandatory schemes or regulations, voluntary labels or certifications, self-assessment tools, questionnaires or tests...):

Now, look at next table, which intends to summarize the existing supporting services related to certification, listed above, and classify them keeping in mind why will you be able to **capitalize** them in your service menu definition, this is, because:

- they come from EU projects applicable in your context,
- they belong to you or your partners, or
- they are already working in your area and can find complementarities for both entities.

This is important because the agreements for using them will be different in the different options.

Remember: these are resources in place regarding certification of the quality of the renovation works facilitated by the Citizen Hub through e.g., the solution packs, including products and materials, the energy assessment or the results evaluation.

EU (From D2.4 section 3 or others)	In-house (Partners resources)	local (Geographically available initiatives)
To Service Menu		To pop-up

A.3. Monitoring

The objective of mapping the existing and applicable monitoring protocols available in place is to **demonstrate** the quality of the renovation works facilitated through the OSS services by the 'seeing is believing' mechanism.

In this case, your **purpose** focuses on the demand side and tackles their (in)ability to read complex data, indicators or results from certifications documents or regulations and the (lack of) time to train. This mechanism is based on the simple before-after comparison of the real performance of the homes.

Purpose	Focus	Stages				
unique	Demand					
Other?						
To Service Model						

Now, think of the monitoring **sources** available at your context level in order to know better your demand side options to get friendly, understandable, relatable information about their homes'



performance (such as stand-alone devices, services related to energy supply contracts or specialized companies...):

Now, look at next table, which intends to summarize the existing supporting services related to monitoring, listed above, and classify them keeping in mind why will you be able to **capitalize** them in your service menu definition, this is, because:

- they come from EU projects applicable in your context,
- they belong to you or your partners, or
- they are already working in your area and can find complementarities for both entities.

This is important because the agreements for using them will be different in the different options.

Remember: these are resources in place regarding monitoring of the improvements provided by the renovation works facilitated by the Citizen Hub through the comparison before-after renovation, this is, from the beginning to the end of the process through e.g., the (pre)evaluation and (post)validation services.

EU (From D2.4 section 3 or others)	In-house (Partners resources)	local (Geographically available initiatives)
To Service Menu		To pop-up

B. The Citizen Hub supporting services proposal

The main objective in this step is to list and allocate the analysed existing supporting tools and protocols in the corresponding stage of the OSS customer journey service offer.

B.1. Services Model

The objective of defining a supporting services model is to get a clear view of the **targets** and purposes of the offered services that guarantee the quality of the works facilitated through the OSS services and on which **stages** of the process

Now, remember your **purpose** for collecting supporting services on each domain: training, certifying, monitoring; and define your quality check model, by just **colouring** the cells according to your needs:

Stage:	Training	Certification	Monitoring
0 - onboarding			
1 – evaluation/ design			
2 – elaboration/ formalization			
3 - construction			
4 - validation			
Focus:	Demand	Supply	To Service Menu





B.2. Services Menu

The objective of defining a supporting services proposal is to get a clear view of the available and applicable existing **resources** helping ensure the quality of the works facilitated through the OSS services according to your model – and identify the **gaps**!

Now, use the previously coloured table and fill the coloured cells with the **best fitting resources** that you can capitalize in any way and therefore offer through your citizen hub implementation. It is considered that you will use the most aligned/appropriate existing resources in the different stages of the Customer Journey according to the previous steps.

Stage:		Training	Certification	Monitoring
0 - onboarding				
1 – evaluation/ design				
2 – elaboration/ formalization				
3 - construction				
4 - validation				
Focus:	Demand	Supply	To Implementation strategy (& platform functionalities) - gaps to pop-up	

This table will help design the implementation strategy and local platform functionalities of your local Citizen Hub according to the customer journey and identify functionalities or services gaps for which alternatives need to be provided.

C. The Citizen Hub roll-out proposal

Finally, the objective of this step is to not only reviewing the existing supporting services available and applicable to offer and/or use within the OSS services menu, but also scouting the existing local sister initiatives that could host temporarily or eventually part or the whole OSS services in areas out of the Citizen Hub territorial or functional competences, in order to expand its reach.

C.1. Decentralization strategy (pop-up)

The objective of decentralization based on existing sister initiatives is to **extend reach** of the OSS services and facilitate access, to maximize project impact

First of all, be aware that some initiatives or services have been listed in previous steps, since they provide specific services related to training, certifying or monitoring, but there might be others not so specific but **rooted, popular or trusted** sources of information regarding dwelling or energy issues (e.g. energy cooperatives, neighbours associations...)

Starting from previous steps local (geographically available) initiatives, try to fill the table below to find out which are your potential allies depending on:

- the services they can provide according to their usual activities and actual spaces (remember gaps from previous step!),
- the targeted reach they enable,
- the proposed schedule for public attention, and
- the mutual benefits enabling the collaboration.





Ask your partners and do not limit to initiatives listed above: there might be others, complementary to your designed Citizen Hub concept!

initiative	Stage/ What (Services to be provided)	Territory/ Where (Geographical scope)	Periodicity/ When (Temporal scope)	Benefits/ Why (Collaboration framework)
To Implementation strategy (and platform functionalities)				

This table will help design the implementation strategy and local platform functionalities of your local Citizen Hub according to the customer journey and the identified functionalities or services gaps.





STEP 4.3. - STAFF TRAINING DESIGN METHODOLOGY

This document will help your Municipality or Region map and design the skills need for your staff, the existing training resources and the training program proposal in your context and implement your own Citizen Hub. It is structured as a series of tables to be filled in a step-by-step process that will lead to the definition of your own objectives, requirements and modalities for your training program.

The objective of this guide is to design a proper training program for your Citizen Hub staff. To do so, think of the services menu designed in [D3.2. Strategy and structure to implement the Citizen Hub concept for the two pilots](#) and follow next steps.

A. Skills

Staff skills needed to deliver the best service to citizens includes assistance in the whole customer journey, this is, the 5 steps, and most of their sub-steps, according to the objectives and functionalities designed according to D3.2 (have at hand your results from StH Document 6).

Stop 0 – onboarding objectives for my citizen hub are to _____

Therefore, staff needs to know, for each sub-step, how to:

Stop 0 - ON-BOARDING	
AWARENESS	INTERACTION
profile <input type="checkbox"/> Customer service <input type="checkbox"/> Legal <input type="checkbox"/> Technician <input type="checkbox"/> Other	<input type="checkbox"/> Customer service <input type="checkbox"/> Legal <input type="checkbox"/> Technician <input type="checkbox"/> Other





Stop 1 – evaluation objectives for my citizen hub are to _____

Therefore, staff needs to know, for each sub-step, how to:

Stop 1 - EVALUATION	
SELF EVALUATION	ASSISTED EVALUATION
profile <input type="checkbox"/> Customer service <input type="checkbox"/> Legal <input type="checkbox"/> Technician <input type="checkbox"/> Other	<input type="checkbox"/> Customer service <input type="checkbox"/> Legal <input type="checkbox"/> Technician <input type="checkbox"/> Other

Stop 2 – elaboration objectives for my citizen hub are to _____

Therefore, staff needs to know, for each sub-step, how to:

Stop 2 - DESIGN & FORMALIZATION		
DESIGN	SELECTION	FORMALIZATION
profile <input type="checkbox"/> Customer service <input type="checkbox"/> Legal <input type="checkbox"/> Technician <input type="checkbox"/> Other	<input type="checkbox"/> Customer service <input type="checkbox"/> Legal <input type="checkbox"/> Technician <input type="checkbox"/> Other	<input type="checkbox"/> Customer service <input type="checkbox"/> Legal <input type="checkbox"/> Technician <input type="checkbox"/> Other





Step 3 – realization objectives for my citizen hub are to _____

Therefore, staff needs to know, for each sub-step, how to:

Stop 3 – REALIZATION				
	TRAINING	ASSESSMENT	MEDIATION	QUALITY ASSURANCE
profile				
	<input type="checkbox"/> Customer service	<input type="checkbox"/> Customer service	<input type="checkbox"/> Customer service	<input type="checkbox"/> Customer service
	<input type="checkbox"/> Legal	<input type="checkbox"/> Legal	<input type="checkbox"/> Legal	<input type="checkbox"/> Legal
	<input type="checkbox"/> Technician	<input type="checkbox"/> Technician	<input type="checkbox"/> Technician	<input type="checkbox"/> Technician
	<input type="checkbox"/> Other	<input type="checkbox"/> Other	<input type="checkbox"/> Other	<input type="checkbox"/> Other

Step 4 – validation objectives for my citizen hub are to _____

Therefore, staff needs to know, for each sub-step, how to:

Stop 4 - VALIDATION				
	FEEDBACK	COMPARISON	MONITORING	CERTIFICATION
profile				
	<input type="checkbox"/> Customer service	<input type="checkbox"/> Customer service	<input type="checkbox"/> Customer service	<input type="checkbox"/> Customer service
	<input type="checkbox"/> Legal	<input type="checkbox"/> Legal	<input type="checkbox"/> Legal	<input type="checkbox"/> Legal
	<input type="checkbox"/> Technician	<input type="checkbox"/> Technician	<input type="checkbox"/> Technician	<input type="checkbox"/> Technician
	<input type="checkbox"/> Other	<input type="checkbox"/> Other	<input type="checkbox"/> Other	<input type="checkbox"/> Other

Remember that skills are not distributed as ‘watertight compartments’, and they all might permeate the services provided on each step (meaning that some skills are needed in different steps and steps).





B. Contents

The project has distributed all the detected skills needs in 4 learning modules, which can be addressed to the whole Citizen Hub as a service provider team or to specific profiles within the team. Please fit your previous section needs for skills on each of the modules, and colour them according to their best fit modalities as defined in the last row:

step	M1: Context & framework: local legislation, subsidies and grants, competences, etc...	M2: Customer journey: services' menu, touchpoints, dependencies, etc...	M3: Tools & services: Specific materials for supporting tools used within the customer journey stops	M4: Soft skills: Communication skills and basic customer service skills
AWARENESS				
INTERACTION				
SELF EVALUATION				
ASSISTED EVALUATION				
DESIGN				
SELECTION				
FORMALIZATION				
TRAINING				
ASSESSMENT				
MEDIATION				
QUALITY ASSURANCE				
FEEDBACK				
COMPARISON				
MONITORING				
CERTIFICATION				
Modality	Tailor made training (half) day	Working group	Course	





Remember, the planned teaching formats are:

- **Tailor-made training days.** Through this modality, technicians will be trained in specific contents adapted to their needs to fill the current gaps identified. These training sessions will be organized **around thematic modules** (such as a module on financing, including updated information on subsidies). The training days will be offered in both **face-to-face and on-line formats**.
- **Working groups.** With the main goal of boosting retrofitting through the contagion effect and based on the knowledge/experience of other stakeholders involved in the different stages of the retrofitting process, **face-to-face meetings** for sharing information will be organized. These workshops will be organized **around the specific stages of the customer journey**.
- **Training courses.** These courses will be in **on-line format** and will **focus on technical content**. The contents will cover the initial design phases through to the completion of the works and subsequent use and maintenance.

C. Resources

Now think of the offers available in your context for covering each content needed, and detect (mark in red) needs for customized contents:

Content (From section B)	Training resource (Name)	Provider (Entity name)	Format (Present/ online)	Duration (hours)	Cost (€)
	Gap!				





D. Program

Finally, recap all information and design **your training proposal** (copy & paste as many tables as you need):

Number	Modality	Profiles	Evaluation	Certificate
--	<input type="checkbox"/> Tailor <input type="checkbox"/> Group <input type="checkbox"/> Course	<input type="checkbox"/> Customer <input type="checkbox"/> Legal <input type="checkbox"/> technician	<input type="checkbox"/> Observation <input type="checkbox"/> test	<input type="checkbox"/> Team <input type="checkbox"/> individual
Stops/ steps	Provider	Format	Duration	Cost
(From customer journey)	(Entity name)	<input type="checkbox"/> Present <input type="checkbox"/> Online	(hours)	(€)
NAME Description...				
			Participants	Total cost
			(number)	(€)

Number	Modality	Profiles	Evaluation	Certificate
--	<input type="checkbox"/> Tailor <input type="checkbox"/> Group <input type="checkbox"/> Course	<input type="checkbox"/> Customer <input type="checkbox"/> Legal <input type="checkbox"/> technician	<input type="checkbox"/> Observation <input type="checkbox"/> test	<input type="checkbox"/> Team <input type="checkbox"/> individual
Stops/ steps	Provider	Format	Duration	Cost
(From customer journey)	(Entity name)	<input type="checkbox"/> Present <input type="checkbox"/> Online	(hours)	(€)
NAME Description...				
			Participants	Total cost
			(number)	(€)





E. Budget

Now summarize your cost for the **setting up** of the citizen Hub:

Number	Stops/ steps	Name	Participants	Cost
--	(From customer journey)	(name)	(number)	(€)
				€ for set up

And reserve some budget for regular training **each year**:

Number	Stops/ steps	Name	Participants	Cost
--	(From customer journey)	(name)	(number)	(€)
				€ each year

And plan your needed **timeline** (hollow the corresponding cell and write the staff profile attending the training). For service continuation, calculate 4 hours per day:

Number	W1	W2	W3	W4	W5	W6	W7	W8

